22R1 Commercial & Medical Content Release Education

April 2022

Veeva

Icons

- Auto-On Feature
- Admin Checkbox
- Veeva Support
- Configuration

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22R1 Key Dates

Dates	Event
March 21	(all PODs) Pre-release vaults available
March 21-25	Validation package available on VeevaDocs **March 21**: System Release Memo **March 22**: Compliance Documents **March 25**: Executed OQs
April 5	**Option 1 - Commercial and Medical Q&A Session** https://veeva.zoom.us/webinar/register/6616443347186/WN_yDTQrsQgR06uNq4z72WLiA
April 6	**Option 2 – Commercial and Medical Q&A Session** https://veeva.zoom.us/webinar/register/6016443347037/WN_3WWwCLaeRKCCa8xXzauYCA
April 7	**Technical Release Education** https://veeva.zoom.us/webinar/register/3316443347147/WN_V22aIAqqRPavqbn0N3b4dw
April 8	Release to all limited release PODs and PODs PODs VV1-2, VV1-1055, VV1-1121 Vault *File Manager does not release at this time, and instead releases with the general release PODs*
April 22	Release to all general release PODs

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Announcements

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MINNEAPOLIS

May 31 — June 2, 2022

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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22R1: Office Online Support

- Learn more about Collaborative Authoring

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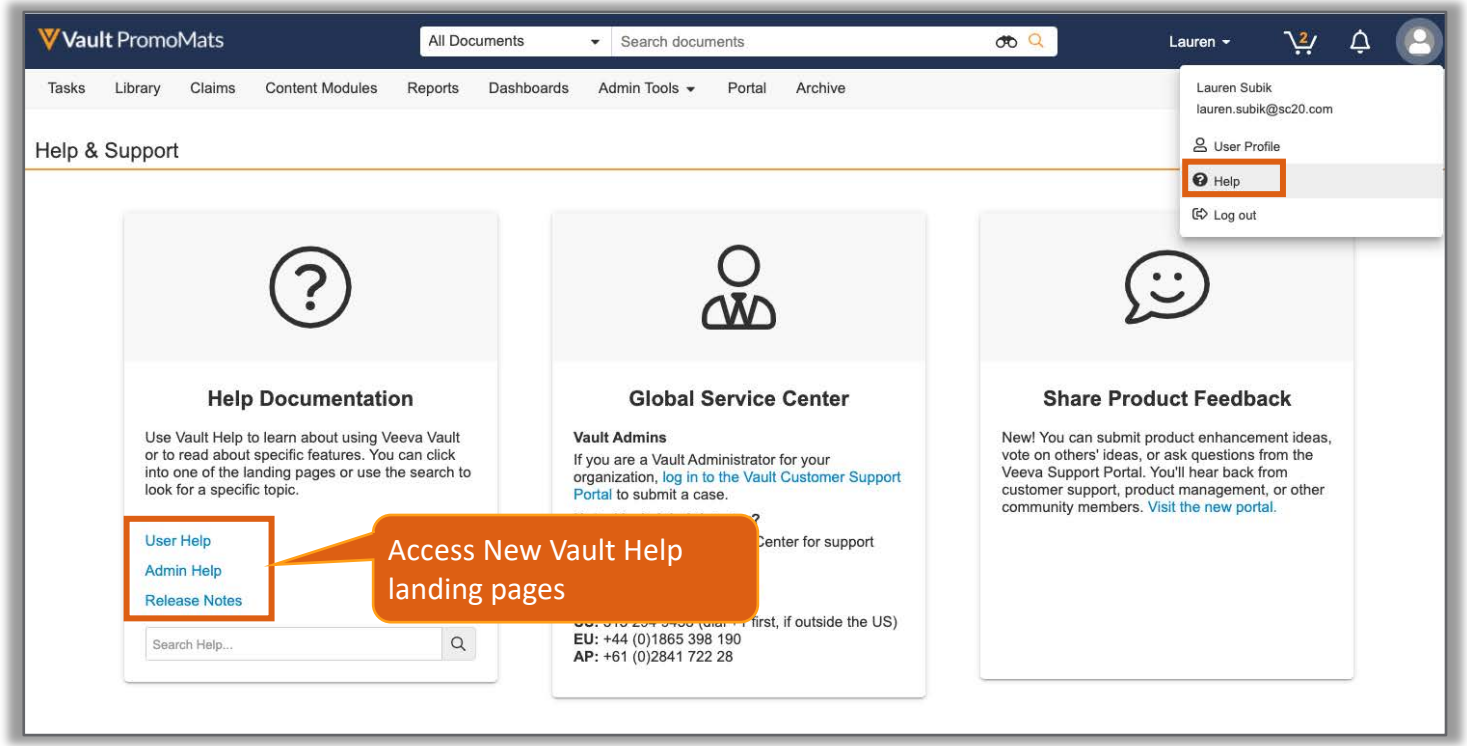
Learn More Links: Vault Help Update

- With this release, “Learn More” links within Vault now target a new Vault Help site
- Updates include:
  - Application switcher
  - New, more robust search
  - Easy access to applications from landing pages
  - Updated videos
  - Updated Learn more links
  - Mirrored content available on classic site for 22R1 General release only
  - Localized language content for Japanese
  - Customers must update links/bookmarks from classic site to new VVH site by 22R2



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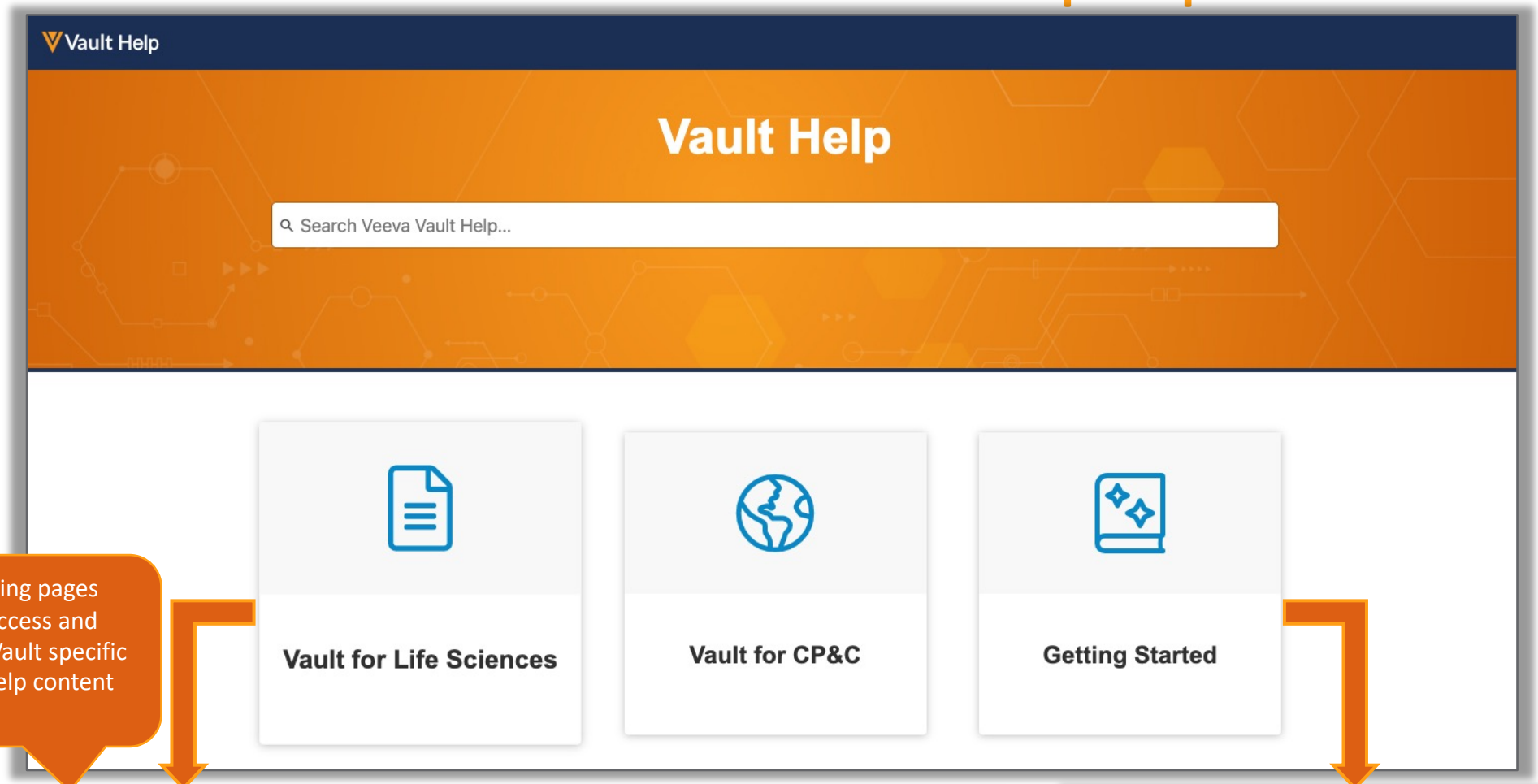
Learn More Links: Vault Help Update



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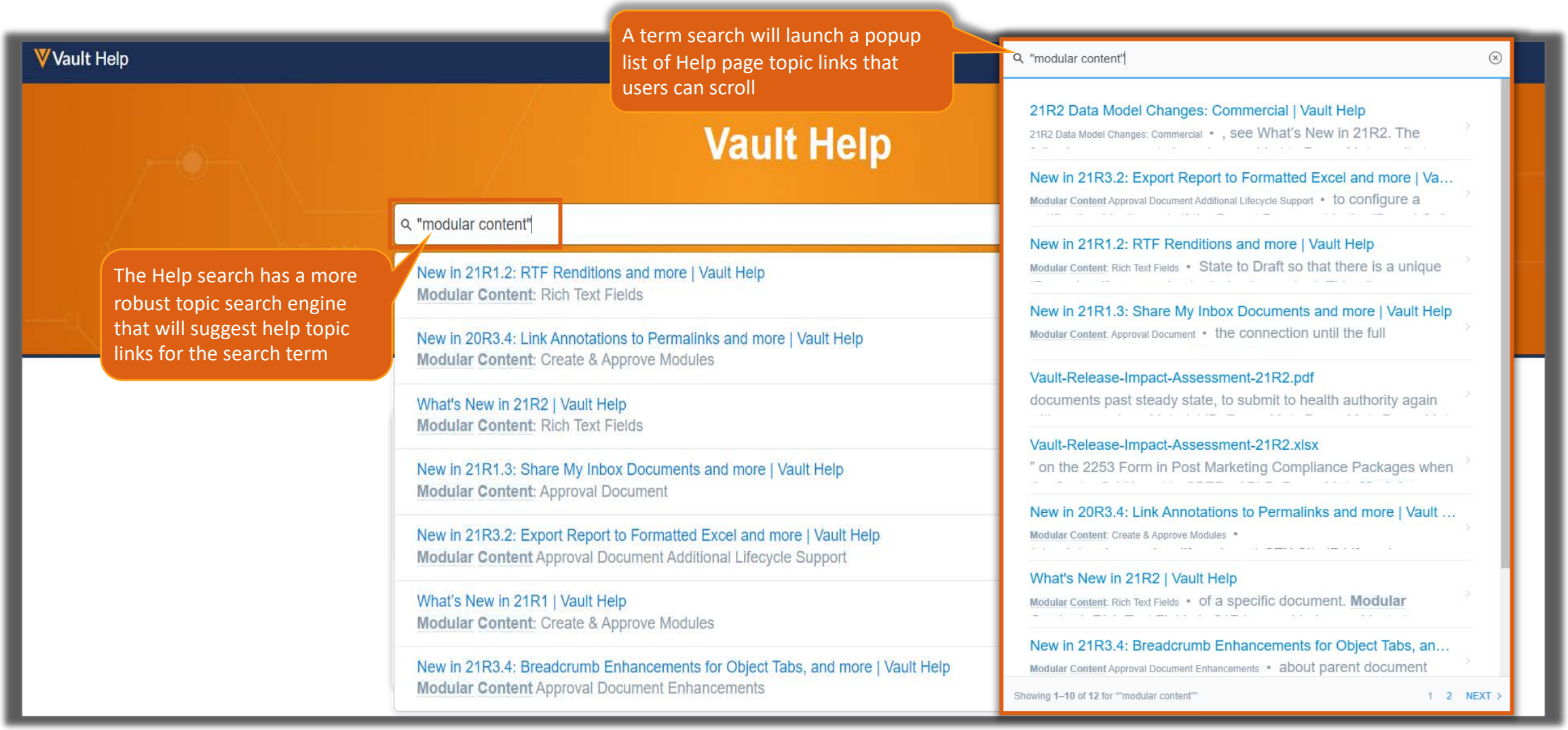

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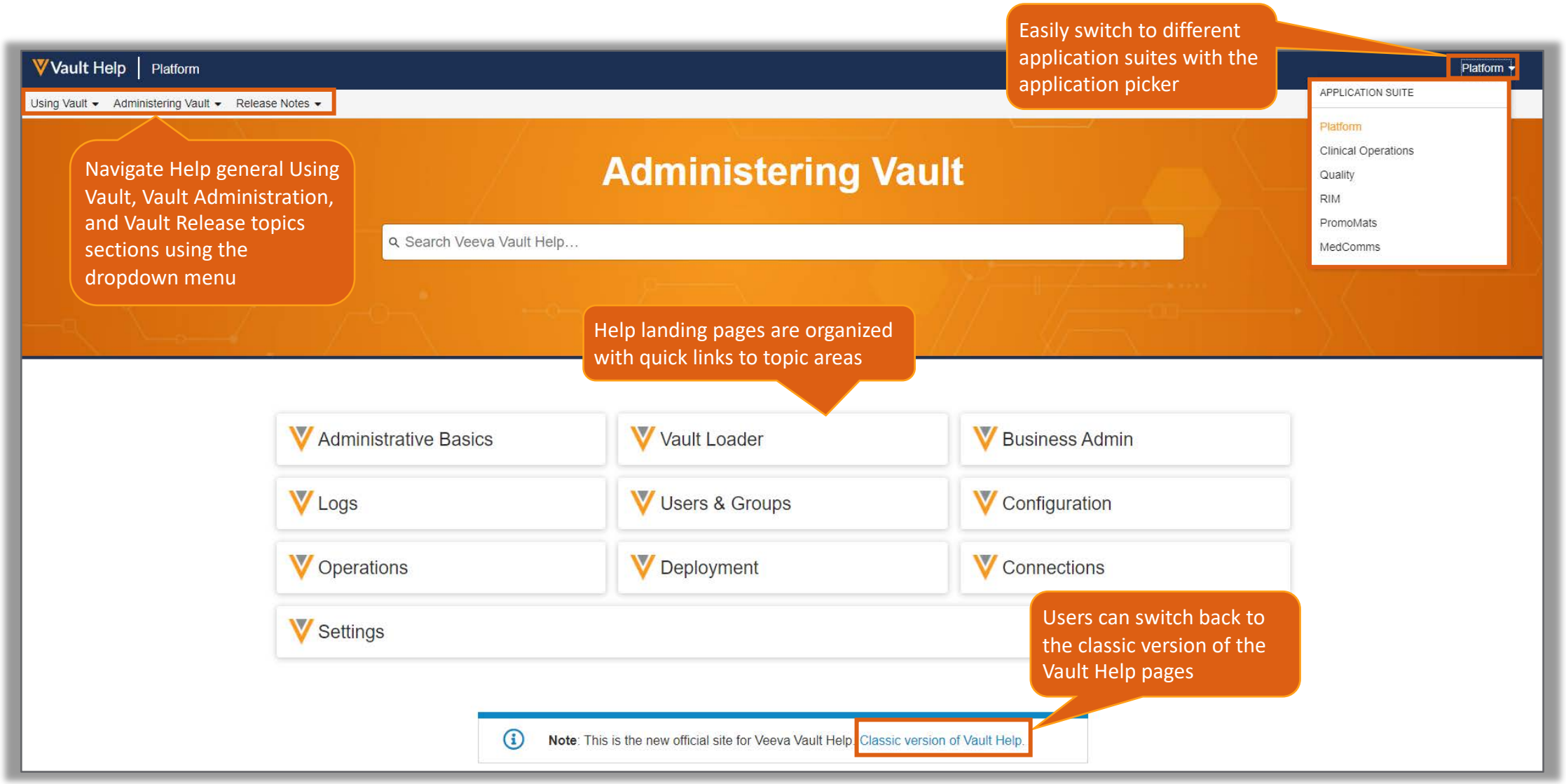

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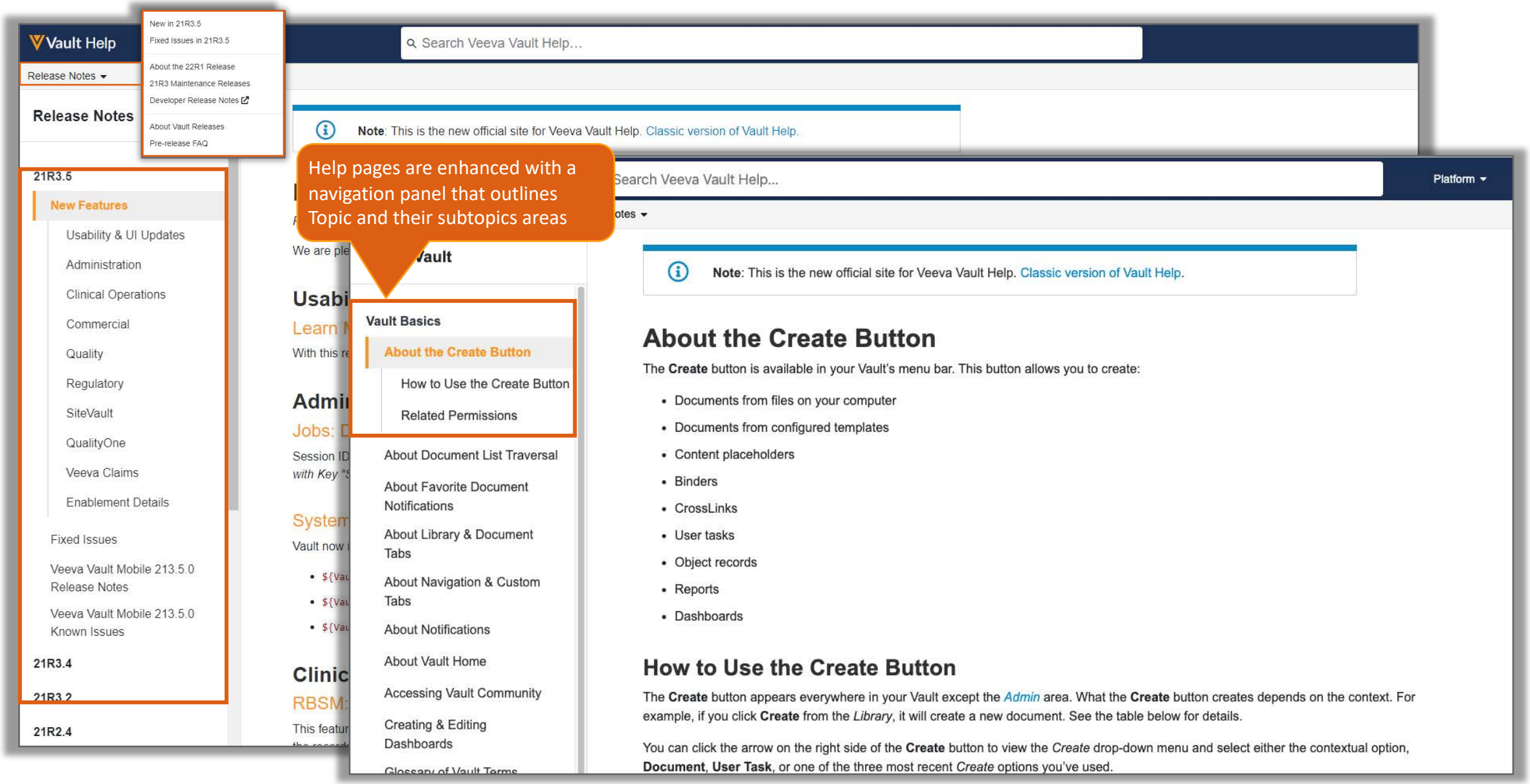

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CRM Document Field Label Updates

- The 22R1 release will include automatic CLM field label updates in PromoMats and MedComms

Document Field	Field	Existing Label Value	New Label Value (22R1)
crm_directory__v	Label	Directory	CRM Directory
crm_keyword__v	Label	Keyword	CRM Searchable Keywords
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)

- **Field labels will continue to be editable by customers**
- **Customers who don't want the updated labels can edit the labels back to the original text post release**

- As part of an overall effort to improve the experience with Veeva CRM, some of the CRM related document field labels are being updated to align with Veeva's recommendations and standard Vault template
  - This update helps to provide a consistent naming convention with newer fields in the Commercial data model and bring alignment with the Veeva's help documentation
  - Learn more about CRM Vault Metadata Sync

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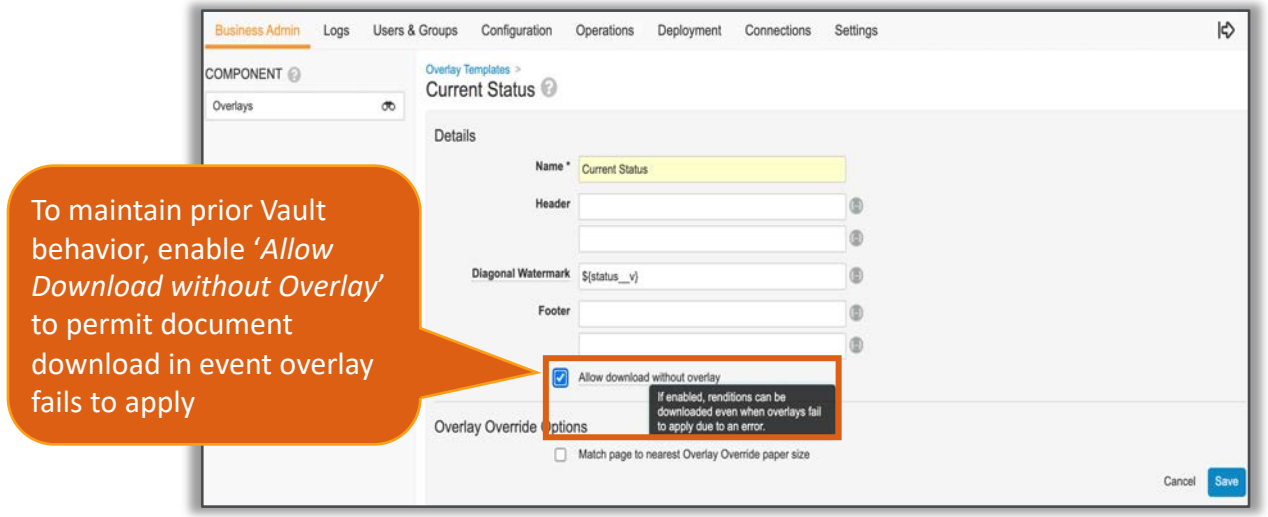
Documents

Required Overlays

- Now, by default, Vault automatically prevents the download of Viewable PDF Renditions when overlays fail to apply
  - If an overlay fails to apply on any page of the document, a message is displayed to user and Viewable Rendition will fail to download



- Considerations:
  - Crosslinked documents will fail to transfer to Target Vault unless '*Exclude Source Document Overlays*' is selected
  - To enable '*Allow Download without Overlay*' option, navigate to:
    - Admin > Business Admin > Overlays > [Overlay Template] > Enable '*Allow Download without Overlay*'
  - Learn more about Managing Overlays

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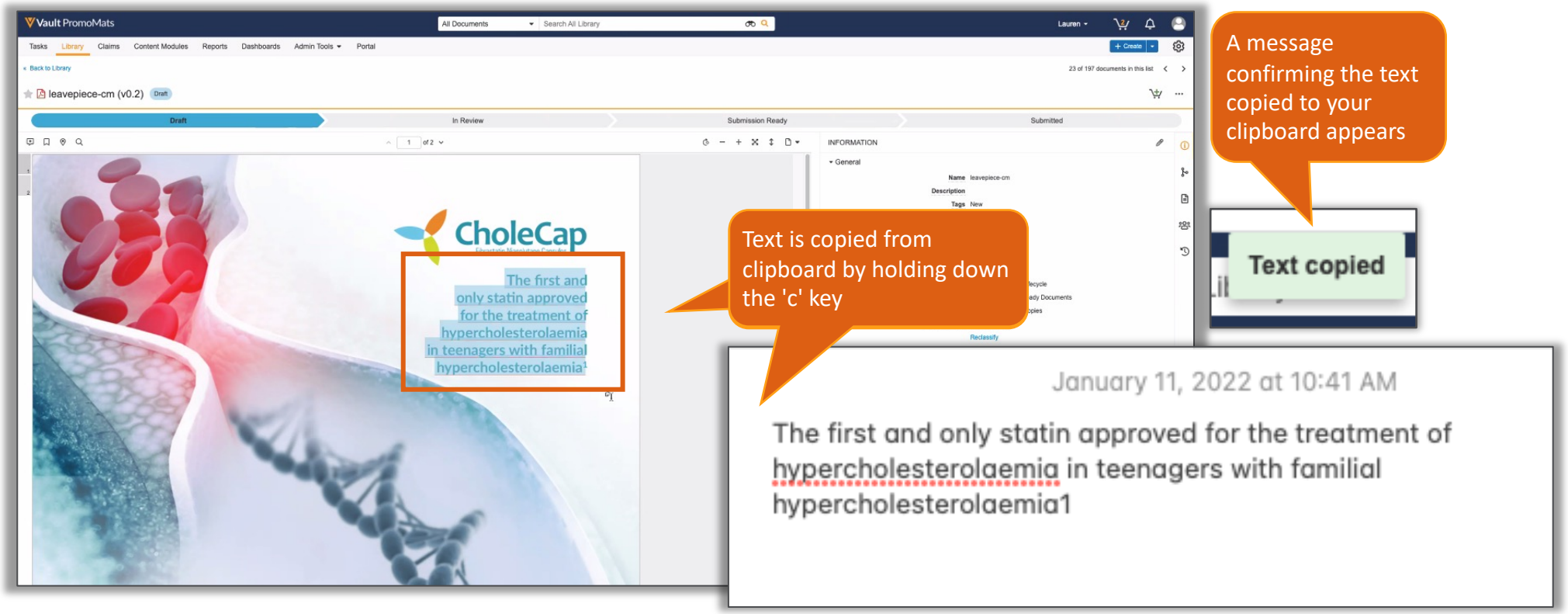
Copy Text from Viewer

- Users can copy selectable text to their clipboard by holding down the ‘C’ key while selecting text



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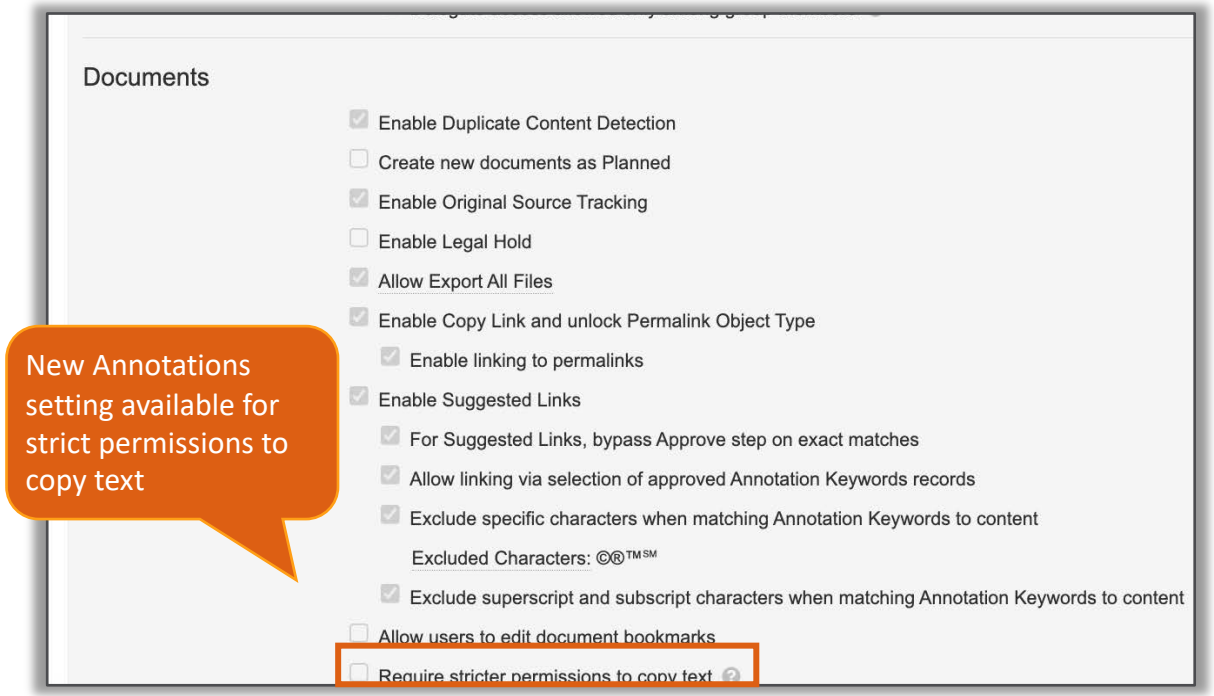
Copy Text from Viewer

- Considerations
  - To opt into strict permissions to copy text:
    - Admin > Settings > General Settings > Annotations > Enable '*Require Stricter Permissions to Copy Text*'
    - Users must have one of the following permissions to Copy Text on a piece: Download Source, Download Rendition, or Annotate
    - Learn more about Copy Text from Viewer



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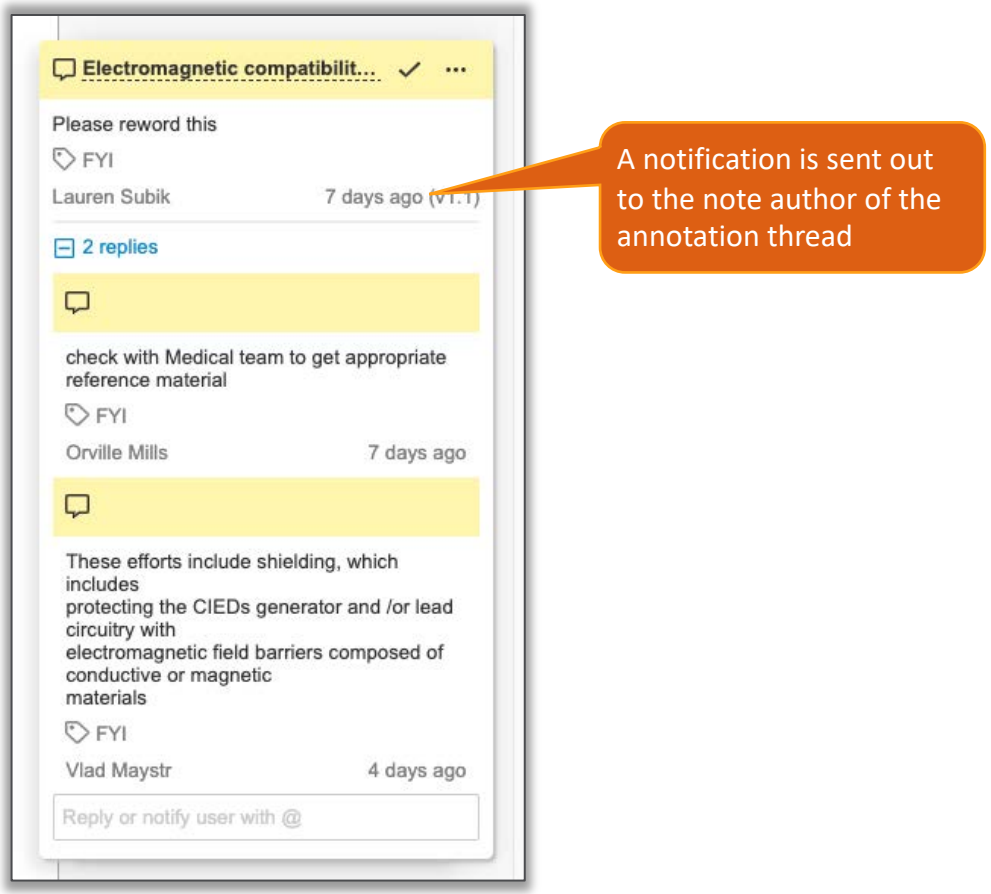
Notifications on Replies to Notes

- When someone replies to a Note annotation Vault sends a notification to the Note author
- Considerations
  - Uses a distinct notification template “Reply Notification”
  - System prevents redundant notifications from a single event
    - If someone replies in a user’s Favorite’d document, and/or includes @user mention, only one notification is sent
  - Notifications link to Note and include reply comment
  - Learn more about Annotating Documents



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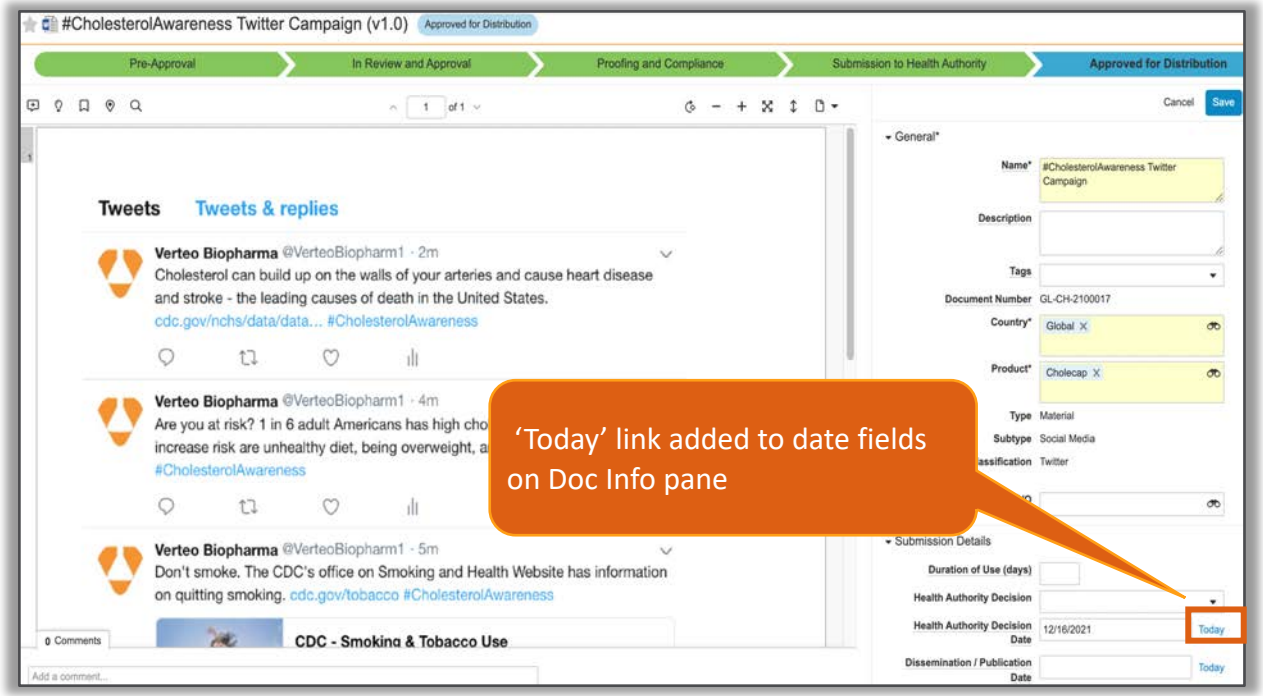
Today Link for Date Fields on Doc Info Page

- A ‘Today’ link has been added next to any *Date* field on the Doc Info pane and on the bulk documents edit page that will automatically stamp today’s date if selected



- Considerations
  - Selecting the ‘Today’ link will populate the *Date* input field with the Vault user’s locale-date format
    - Ex: US user dates will populate as MM/DD/YYYY
    - Ex: EU user dates will populate as DD/MM/YYYY
  - Learn more about Managing Document Fields

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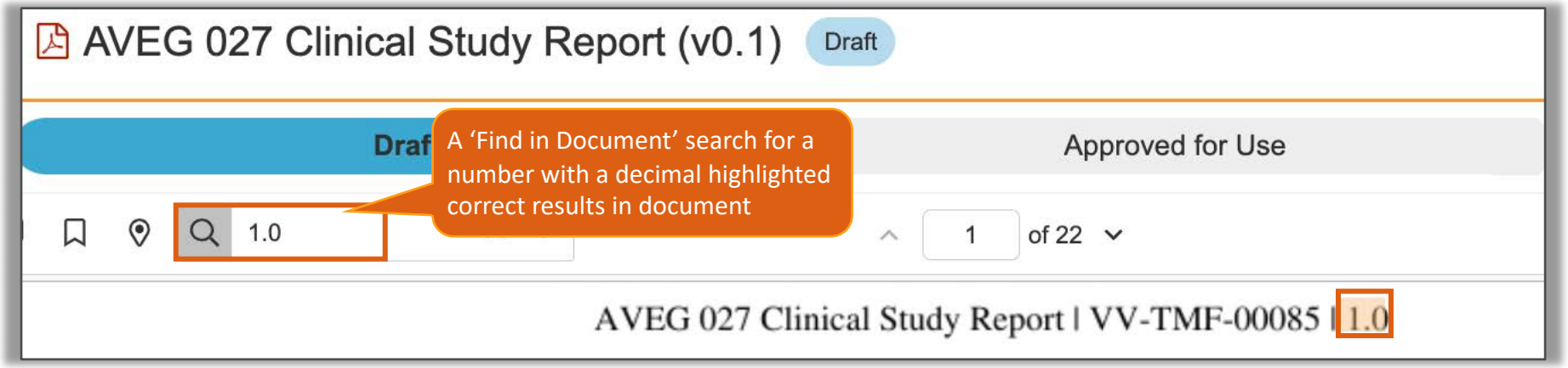
Text Indexing & Combination Enhancements

- The search within Document Viewer now correctly indexes, finds, and highlights text in documents that contain word separating characters including periods, commas, semicolons, dashes, and quotation marks



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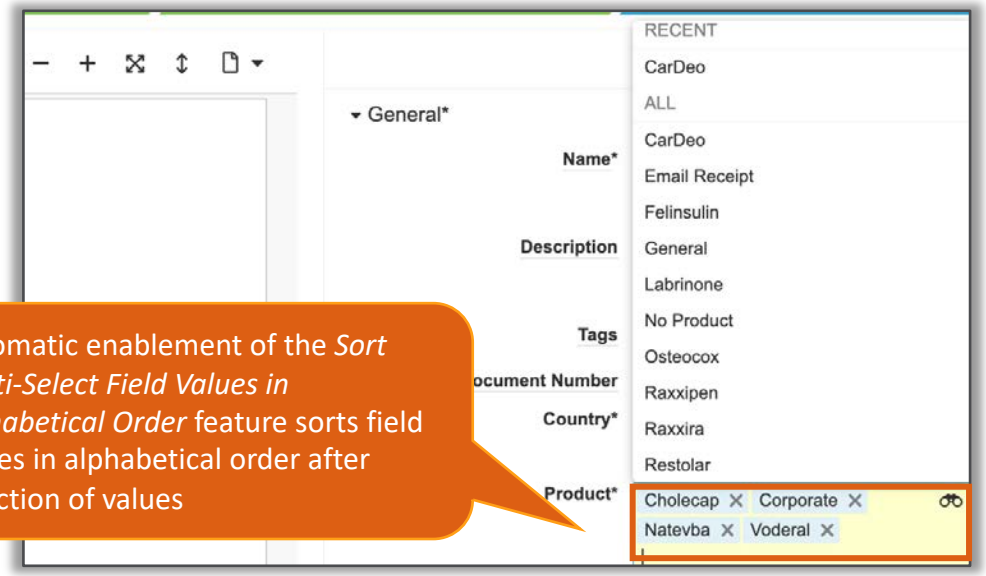
Alphabetically Sort Multi-Select Field Values

- *Sort Multi-Select Field Values in Alphabetical Order* feature is now automatically enabled across Vaults



  - Learn more about Sort Order for Multi-Select Fields

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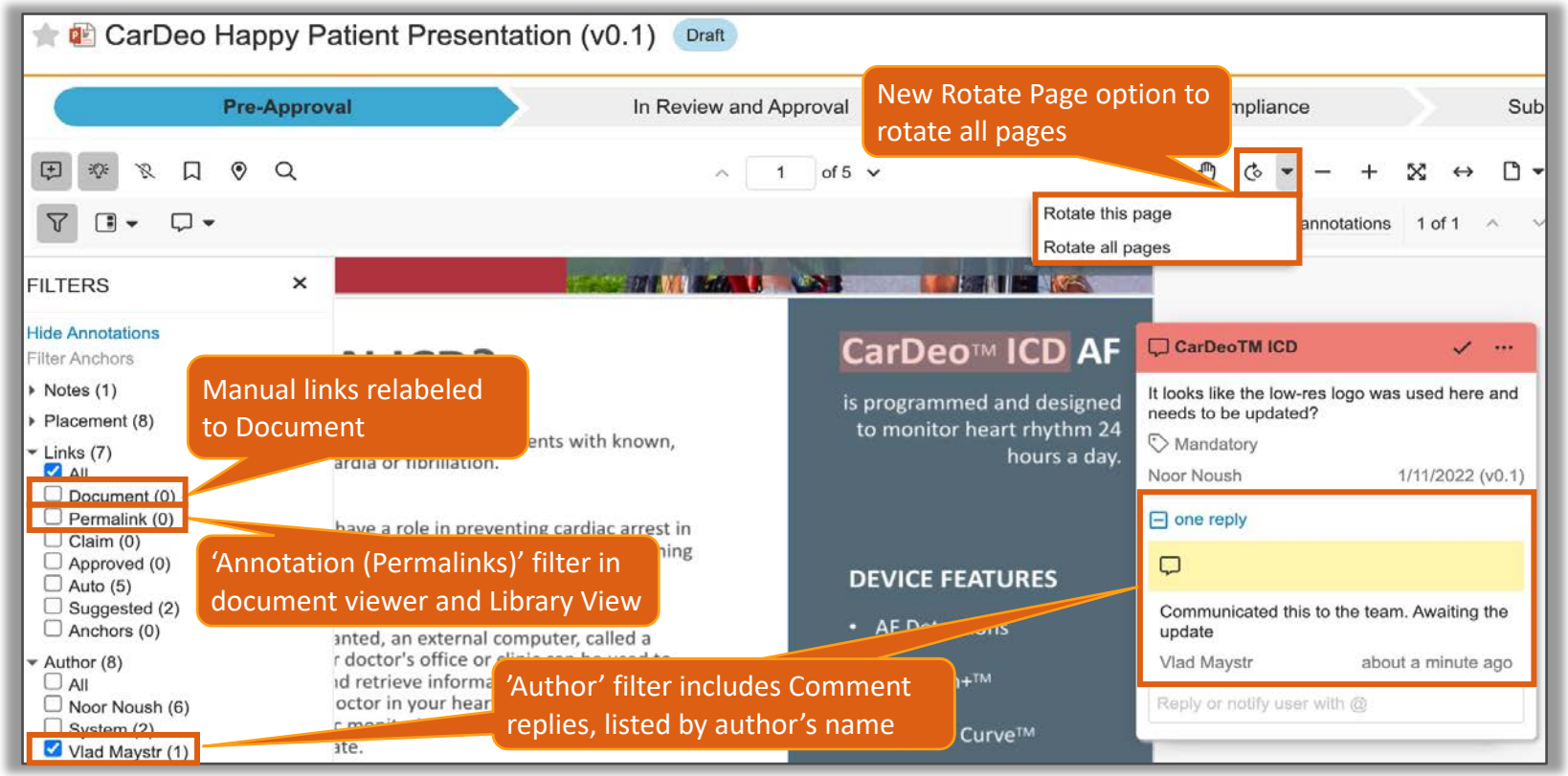
Annotate Usability Improvements

- The following enhancements have been implemented to improve a user's ability to interact with documents and annotations:
  - Annotation Filters:
    - 'Author' filter includes Comment replies, listed by author's name
    - 'Links' filter includes permalinks and manual links have been relabeled to 'document' links
  - Rotate page now includes two options: Rotate Current Page and Rotate All Pages
  - Zoom, Fit, and Full Screen are applied with buttons rather than menus
  - Toolbar buttons are visibly disabled while composing annotations
  - Users can scroll, zoom, apply full screen, fit width, and height while composing annotations
  - Permalinks are also available in the Library view as a column in the grid view



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Annotate Usability Improvements

- Considerations
  - The Rotate Page(s) option will only perform a clockwise rotation
  - Rotation is only applicable for user performing the rotation and is reverted upon page refresh
  - Learn more about Annotating Documents

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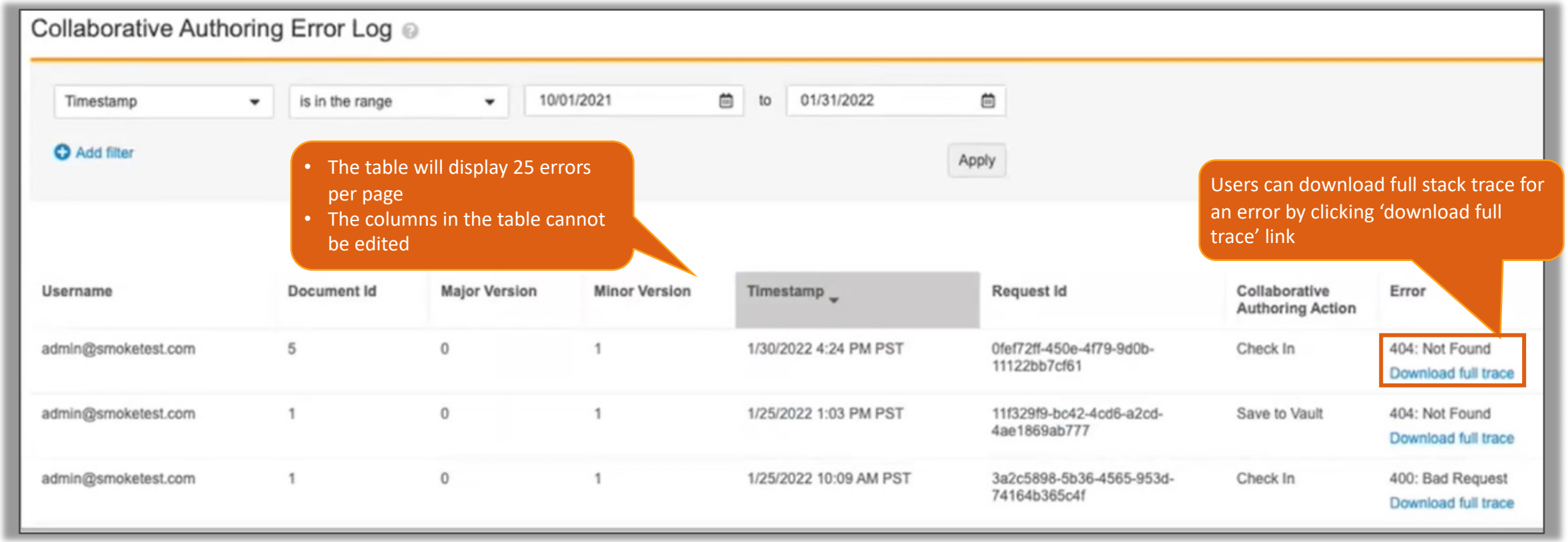
Collaborative Authoring Troubleshooting Page

- A new Collaborative Authoring Troubleshooting Page is now available and will display all Microsoft Graph API errors that occur in a Vault to support customers with any troubleshooting related to Collaborative Authoring
  - To access the Collaborative Authoring Troubleshooting page, navigate to Admin > Logs > Collaborative Authoring Error Log



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Collaborative Authoring Troubleshooting Page

- Considerations
  - Users must have permission to access the troubleshooting page
    - A new permission set checkbox is available within each permission set under Users & Groups > Permission Sets > [Permission Set] > Admin > Logs > Collab Authoring Error Logs

	All Audit	System Audit	Login Audit	Document Audit	Object Record Audit	Domain Audit	Vault Java SDK	API Usage	Collab Auth Error Logs
Logs	☐	☐	☐	☐	☐	☐	☐	☐	☑

  - The Collaborative Authoring Troubleshooting log can be exported to a .csv file and filtered by timestamp, username, and Document ID—timestamp filter always displayed
  - A job will run on the first day of each month to delete any errors that are older than one month
  - Learn more about Using Collaborative Authoring with Microsoft Office

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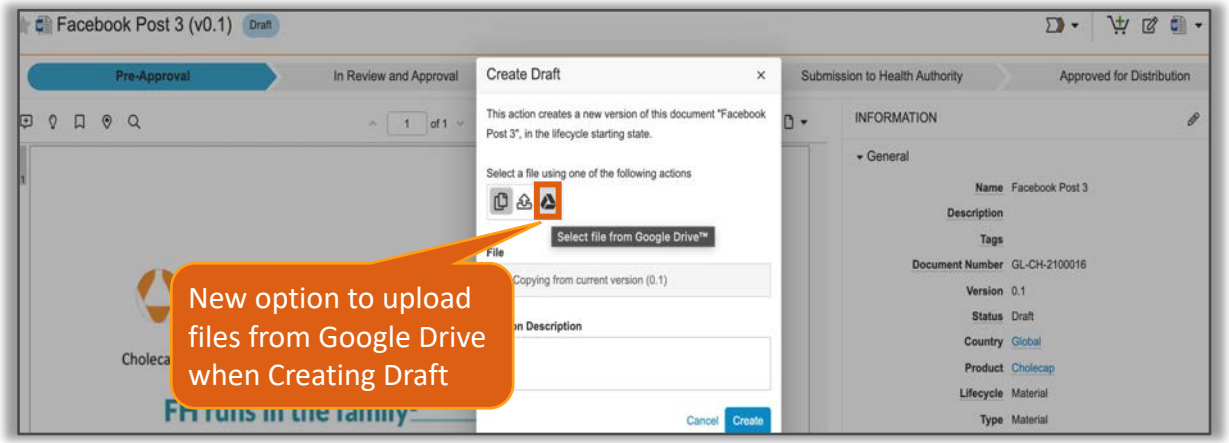
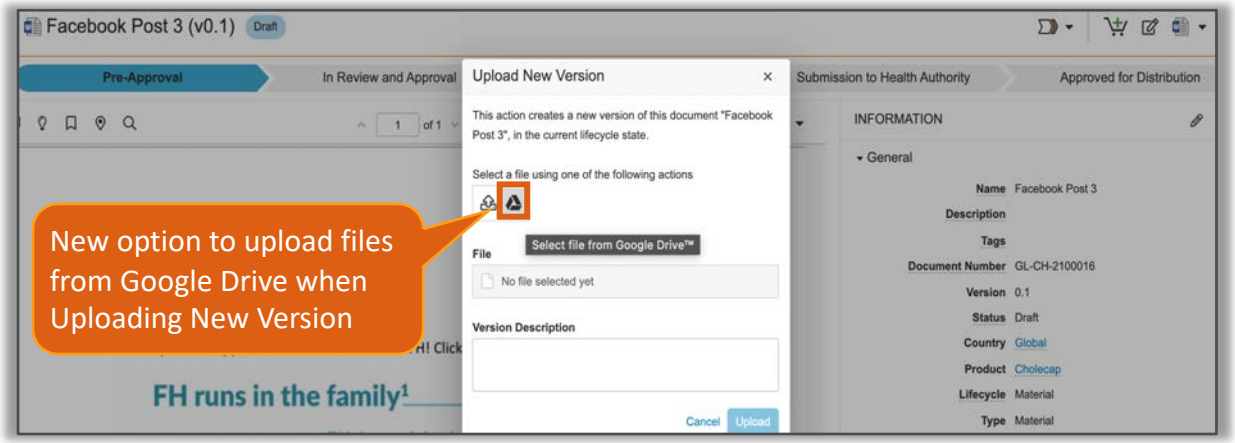
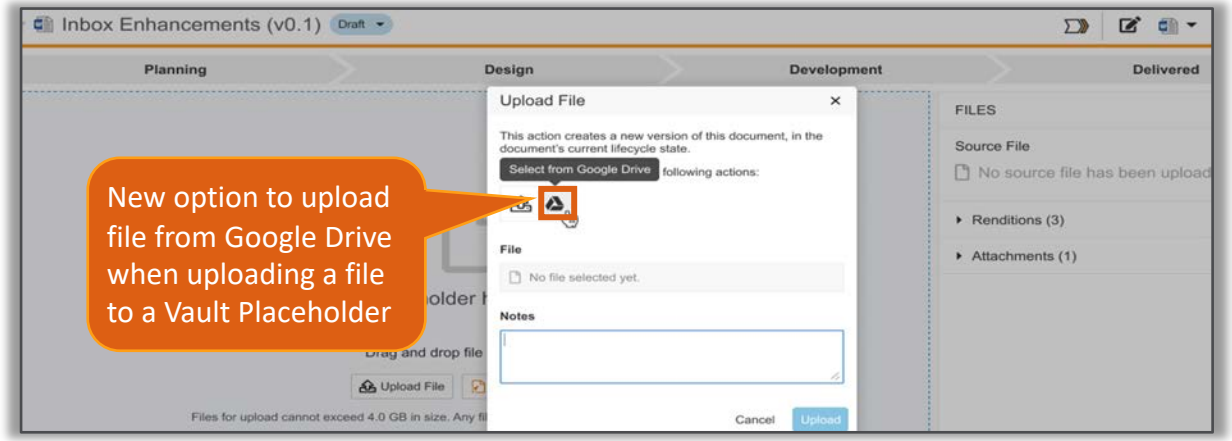
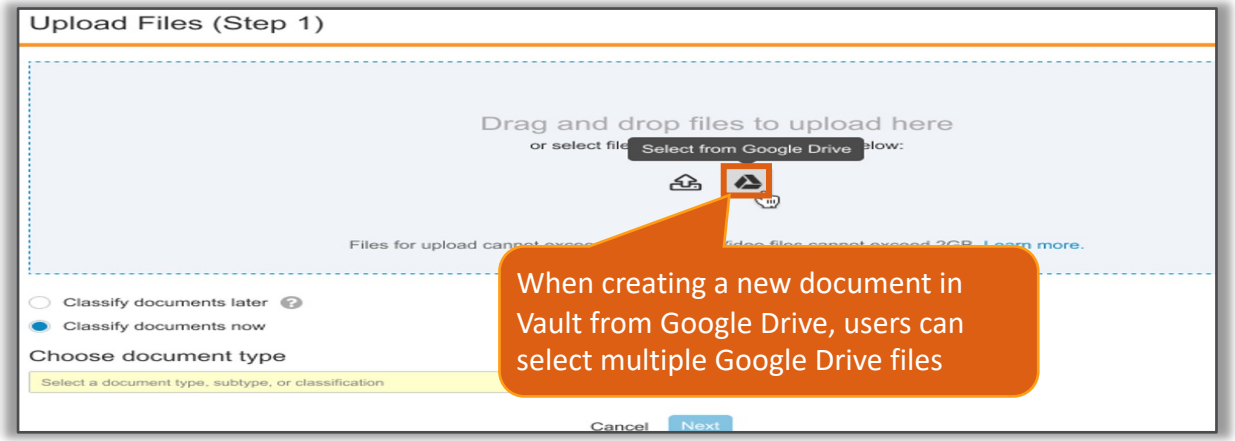
Google Drive Integration Enhancements

- Vault's Google Drive Integration now allows users to browse for and select files from their Google Drive when creating a draft, uploading a new document version, uploading to a placeholder, and creating a new document in Vault









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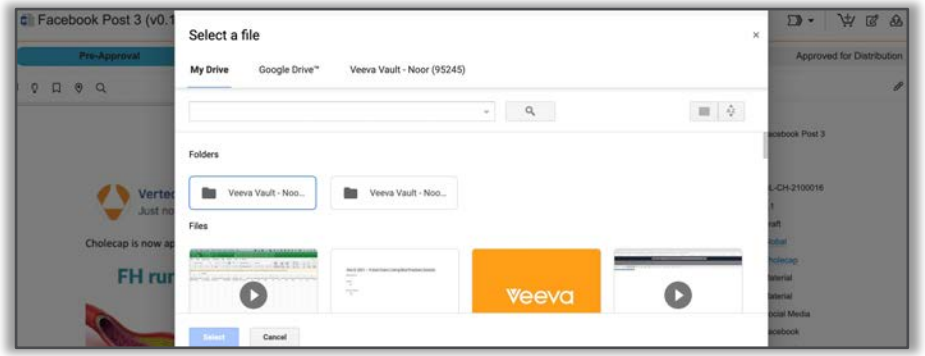
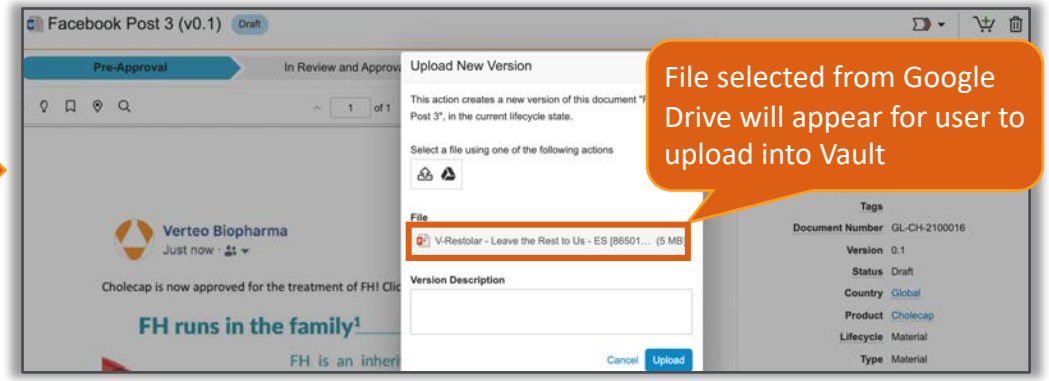
Google Drive Integration Enhancements

- Upon selecting the Google Drive icon, the Google File Picker launches and users can select a file to upload from:
  - ‘My Drive’: Google drive associated with user’s account
  - ‘Google Drive’: Includes user’s shared folders
  - ‘Veeva Vault’: Folder created by Vault in user’s Google Drive





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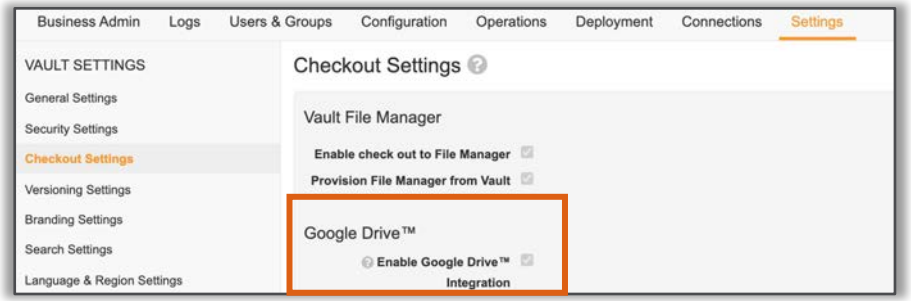
Google Drive Integration Enhancements

- Considerations
  - Users can only select one Google Drive file when uploading a file as a new version in Vault, creating a draft, or uploading to a placeholder
  - If wrong Google Drive file is chosen, user can re-select Google Drive icon to select different file
  - Upon selecting the Google Drive icon, Vault authenticates the Google account the user is logged into
    - If user is logged into multiple Google accounts, they must select the account to use
  - The following Google Workspace file types will be converted into Microsoft Office file formats as the uploaded document's source file:
    - Google Docs: converts to a .docx file
    - Google Sheets: converts to a .xlsx file
    - Google Slides: converts to a .pptx file
  - Google Connected Apps such as Forms or Drawings are not supported for file upload into Vault
  - Learn more about the Google Drive Integration
- Configuration
  - Admin > Settings > Checkout Settings > Enable '*Google Drive Integration*'



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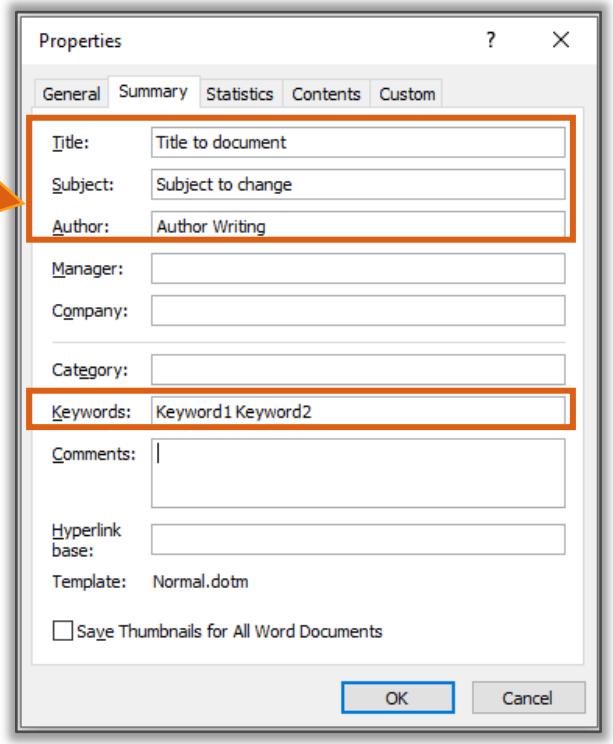
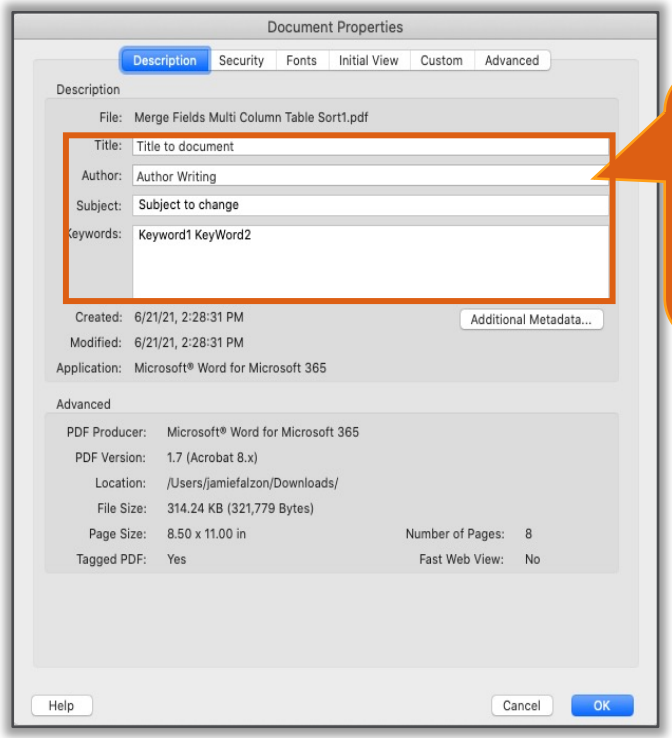
Auto-Populate Rendition PDF Metadata

- Vault can now populate the basic document metadata in a Viewable Rendition's 'PDF Document Properties' section based on the original source document's properties
  - Only PDF renditions for Microsoft Word, Excel, and PowerPoint source documents will populate the Rendition's properties

Source File Properties:

Only Title, Author, Subject, and Keyword fields from Source Document will be maintained onto the downloaded Viewable Rendition





Viewable Rendition Properties:

Title, Author, Subject, Keyword fields from Source Document are maintained on downloaded Viewable Rendition

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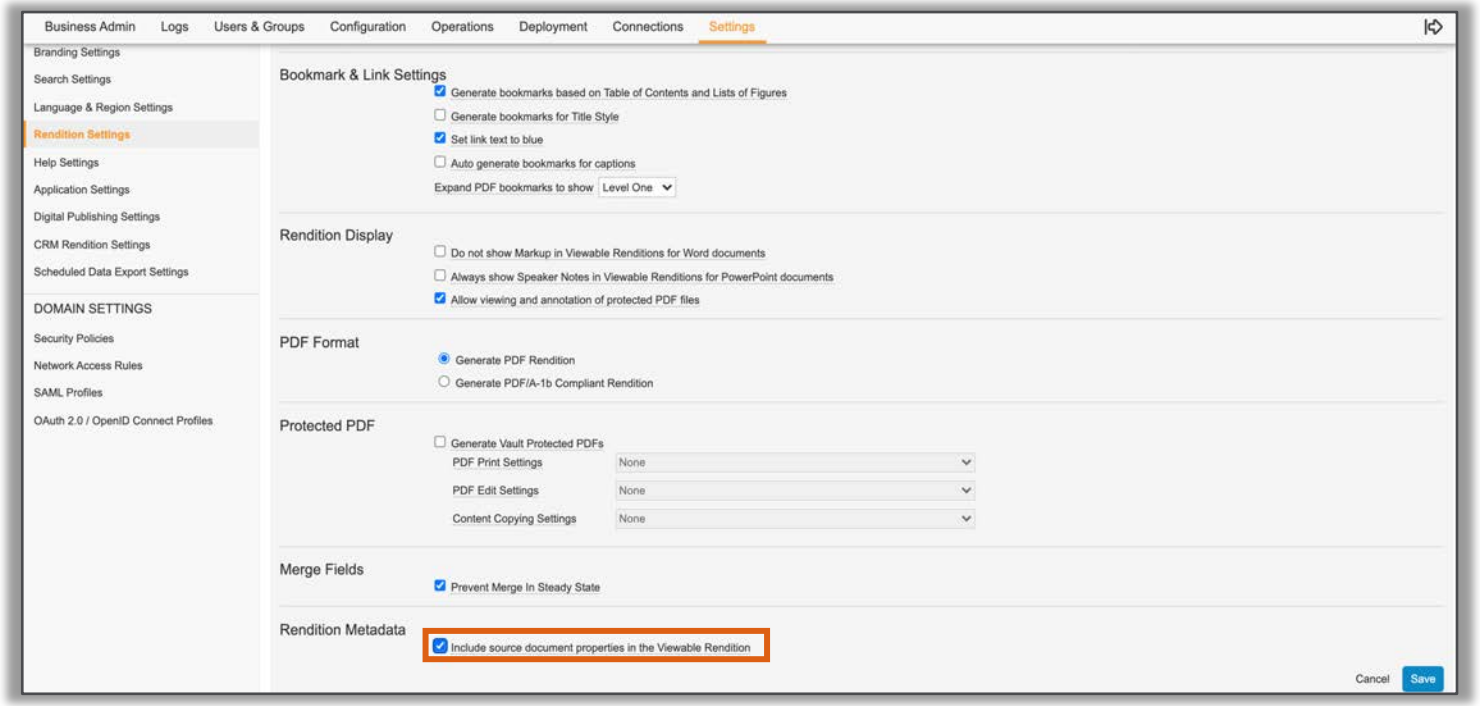
Auto-Populate Rendition PDF Metadata

- Considerations
  - This feature is also available to enable for Rendition Profiles
  - PDF/A documents retain document properties from PDF files
  - Learn more about Rendition Metadata
- Configuration
  - Admin > Configuration > Settings > Rendition Settings > Rendition Metadata > Enable '*Include source document properties in the Viewable Rendition*'



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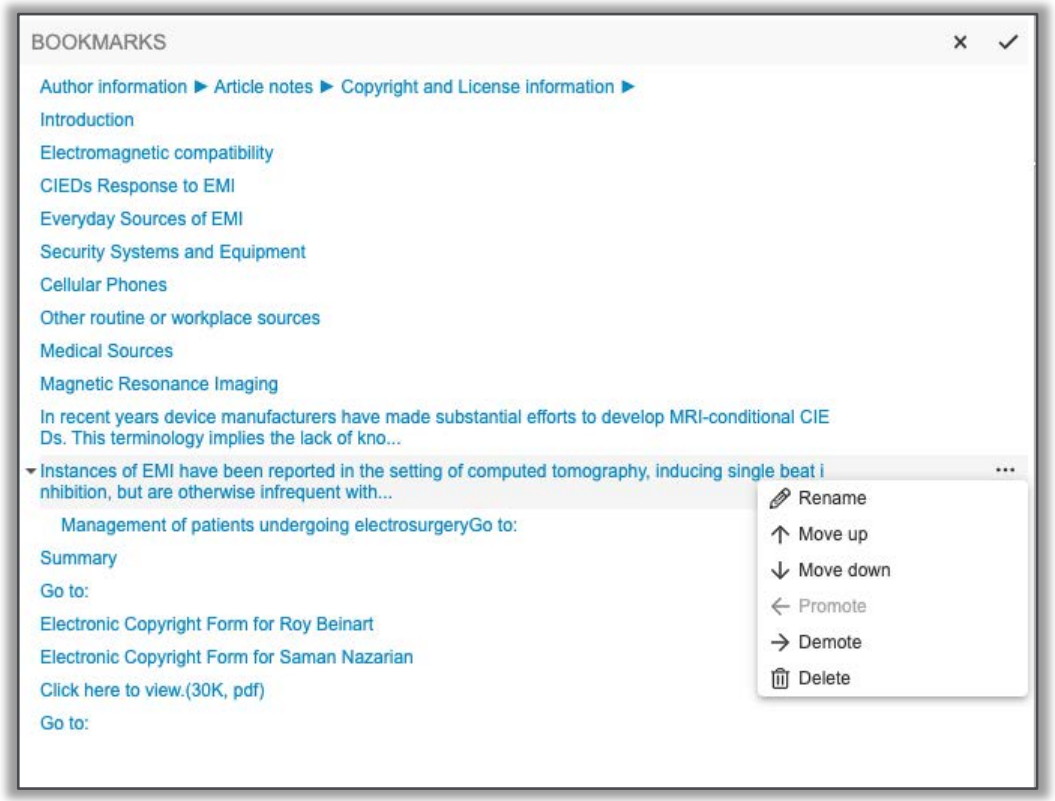
Editable Bookmarks

- When enabled, this feature allows users to edit Bookmark attributes on the Doc Info page
- Considerations
  - Once saved, the edited bookmarks persist only in the specific version of the viewable rendition
  - Supported actions include Rename, Move Up, Move Down, Promote, Demote, and Delete
  - Users with Manage Viewable Rendition permission can edit Bookmarks
  - Learn more about Bookmarks
- Configuration
  - Admin > Settings > Documents section: “Allow users to edit document bookmarks”



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Caption Bookmark Exclusions

- Admins can now configure Vault to exclude Table, Figure, and SeqTableNote captions when generating bookmarks on downloaded renditions
- Considerations
  - The ‘Generate List of…’ bookmark sections per caption type setting is now accessible by Admins
  - The *Exclude Captions of Type* picklist is only active when either of the following Rendition settings are set to generate bookmarks:
    - Auto Generate Bookmarks for Captions
    - Generate ‘List of…’ bookmark sections per caption type
  - Additional captions to exclude can be added to the *Caption Exclusions* picklist
  - Up to 25 captions can be excluded in Rendition Settings and in each Rendition Profile
  - Learn more about Bookmark Support

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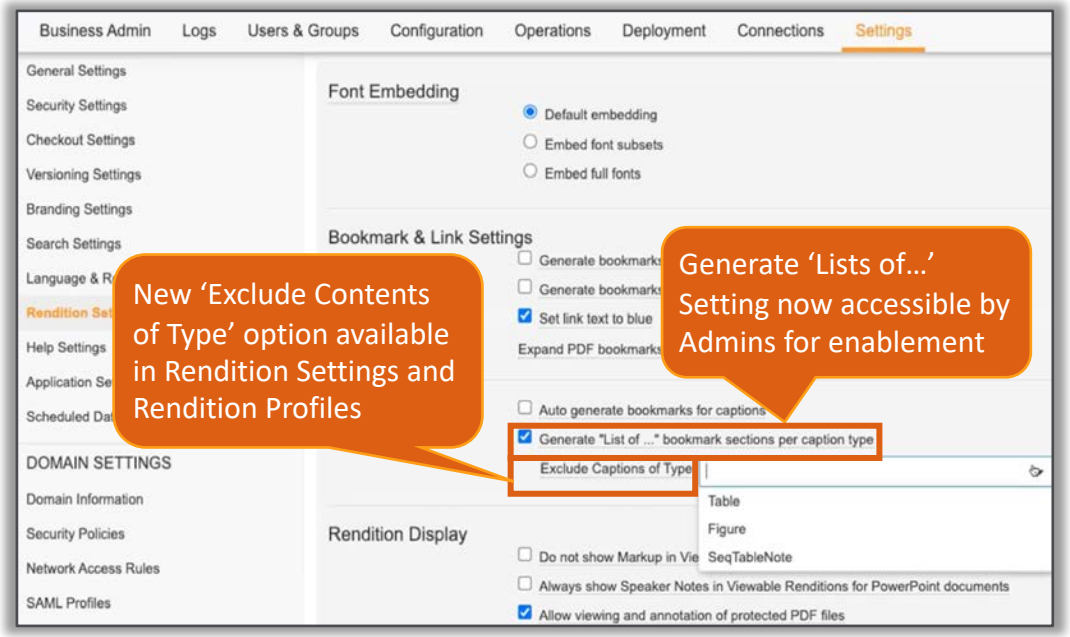
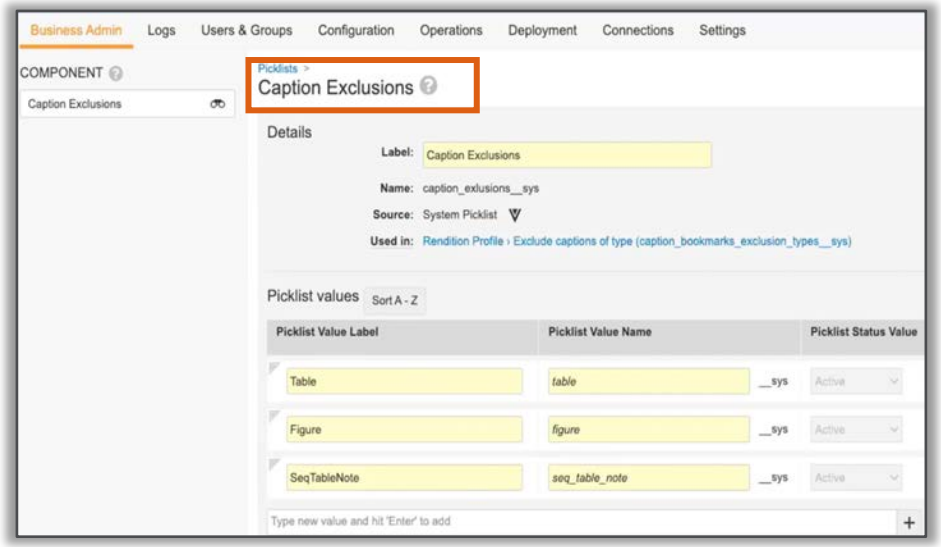
Caption Bookmark Exclusions

- Configuration
  - Admin > Settings > Rendition Settings > Bookmark & Link Settings > *Exclude Captions of Type* picklist
  - Admin > Business Admin > All Picklists > Caption Exclusions > Edit *Caption Exclusions* picklist





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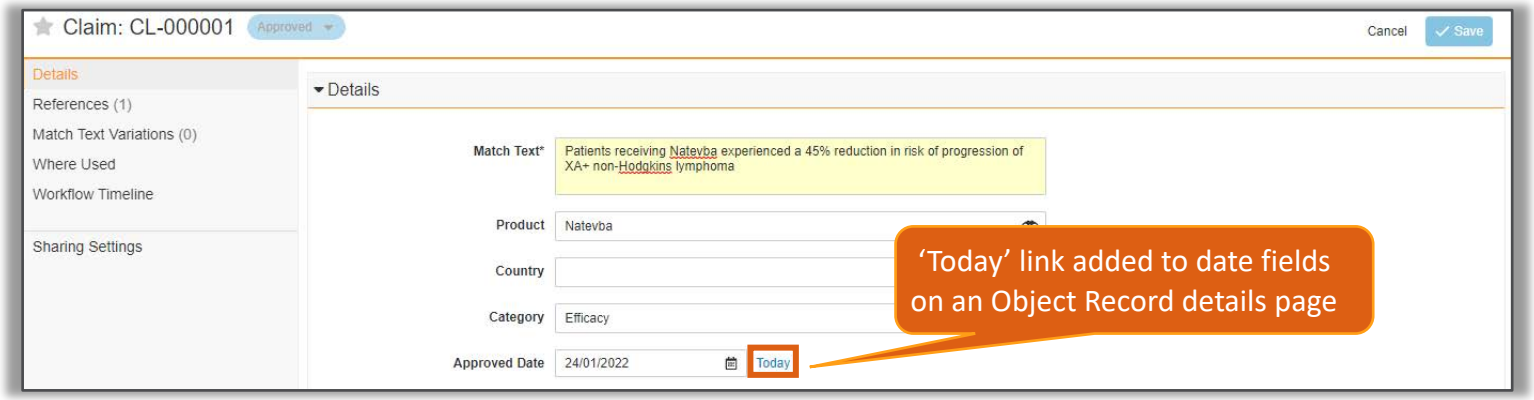
Objects

Today Link for Date Fields on Object Record Detail Page

- A ‘Today’ link has been added next to any Date field on the Object Record Details page and on the bulk objects edit page that will automatically stamp today’s date if selected



- Considerations
  - Selecting the ‘Today’ link will populate the Date input field with the user’s locale date format
    - Ex: US user dates will populate as MM/DD/YYYY
    - Ex: EU user dates will populate as DD/MM/YYYY
  - Learn more about Object Date Fields

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High Volume Object Multi-Value Picklist Field

- High Volume Objects (HVO) now supports multi-value picklist fields
  - You can create up to two (2) multi-value picklist fields per high volume object
- Considerations
  - You cannot use the contains operator in filters on multi-value picklist fields in high volume objects
  - Multi-value picklist fields cannot exist in multiple AND / OR groups; Must be explicitly grouped together
  - Max of 5 AND filters
  - Learn more about Configuring High Volume Objects

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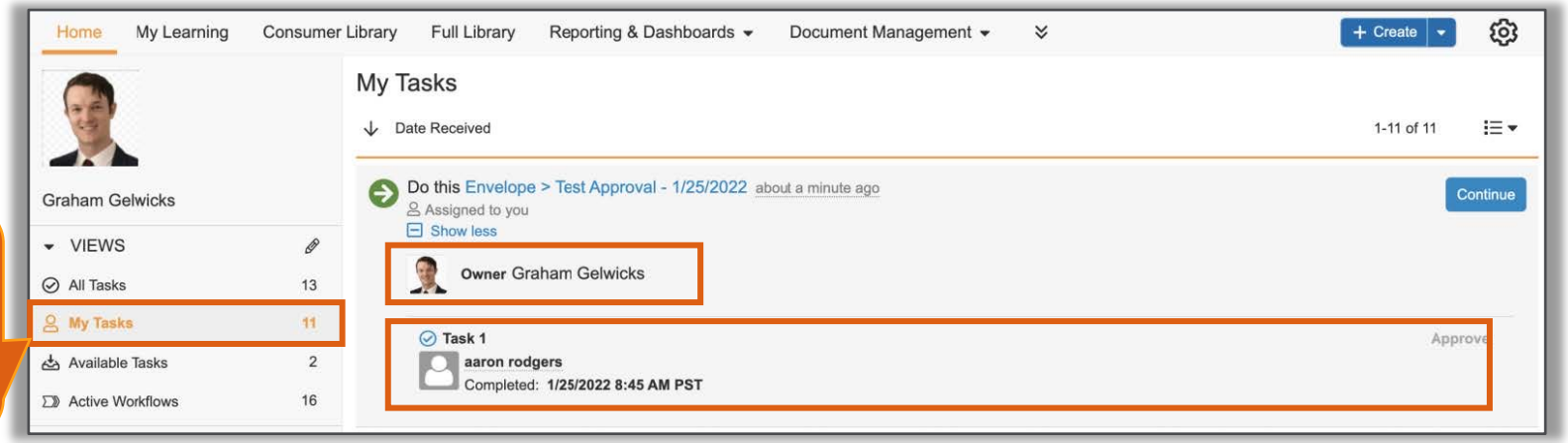
Lifecycles and OneWorkflow

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

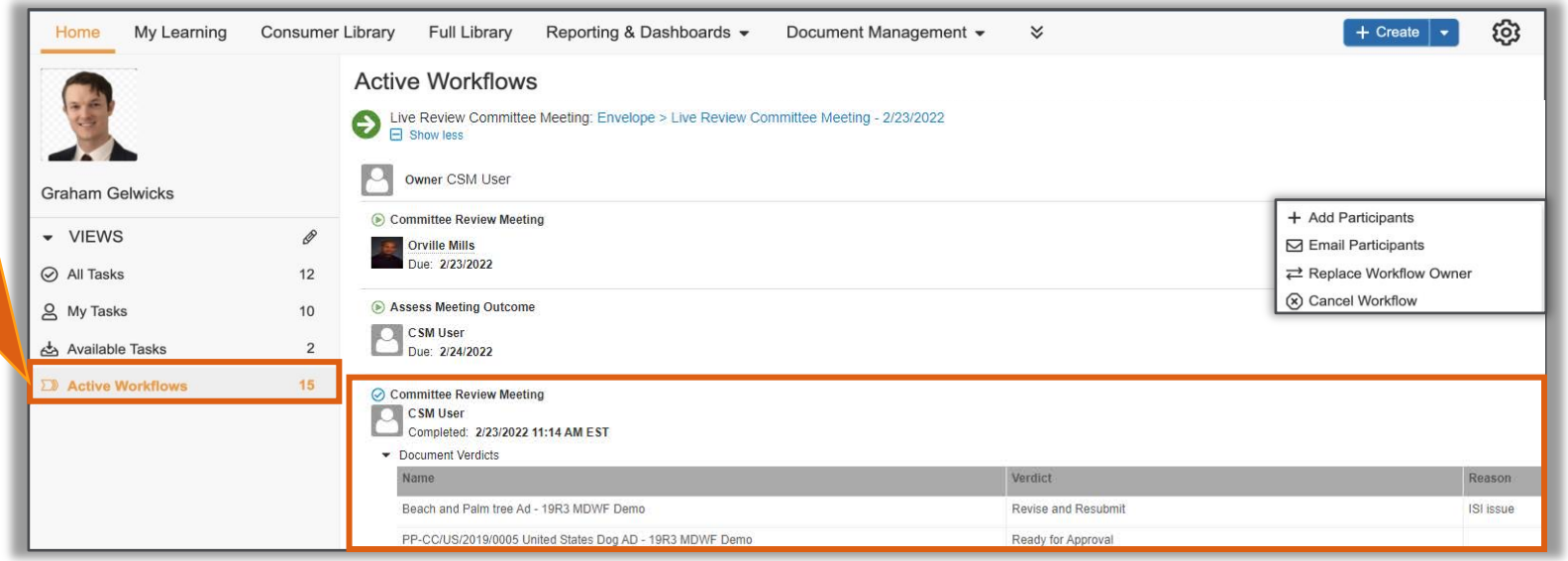
Show More on Tasks in Home Pages

- The Home Page All Tasks, My Tasks, Available Task and Active Workflows views are enhanced to provide additional information for OneWorkflow items
  - Learn more about Vault Home

The Show More option on the All Task and My Task views now includes:
- Workflow Owner information
- Previous task information (optionally)



The Show More option on the Active Workflows view now includes details on:
- Tasks
- Status
- Assignees
- Available Actions
- Completed Task Document Verdicts



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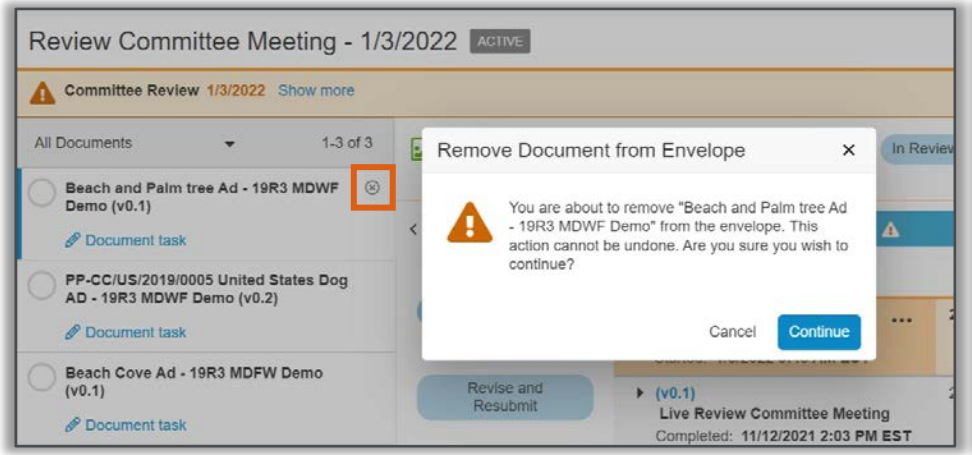
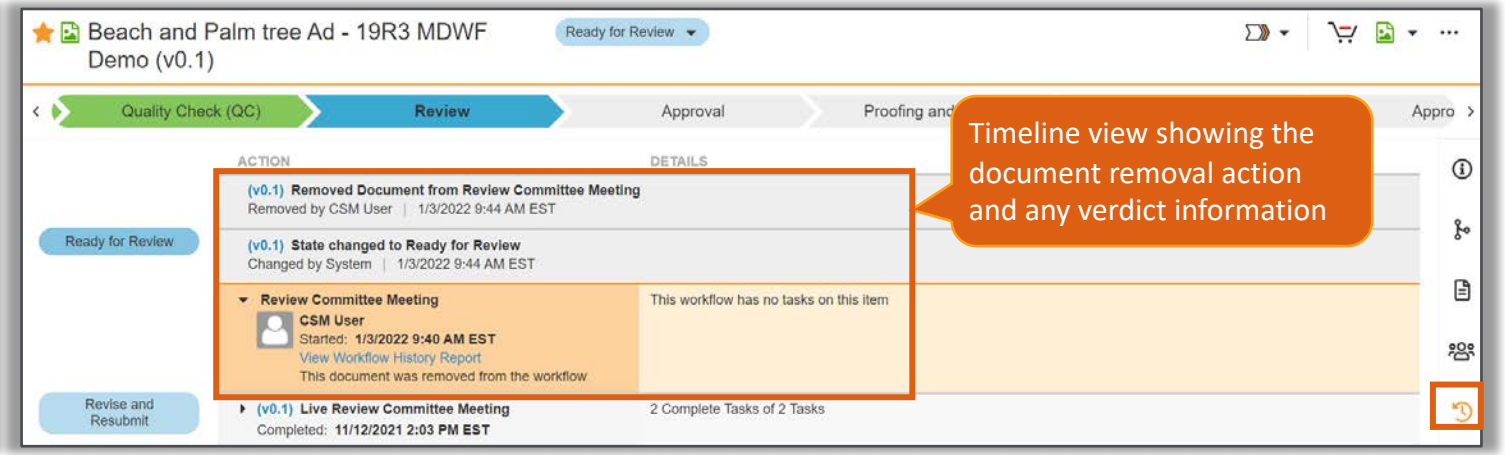
Verdict Information & Reporting on Removed Documents

- The Document Workflow timeline view will now show verdict information for documents that are removed from an Envelope manually or by a content action





  - This enhancements also enables reporting and notification tokens on Verdicts to capture removed documents

- Considerations
  - When a document is removed, it's state is set to Removed in the Envelope
  - Learn more about Using Document Workflows

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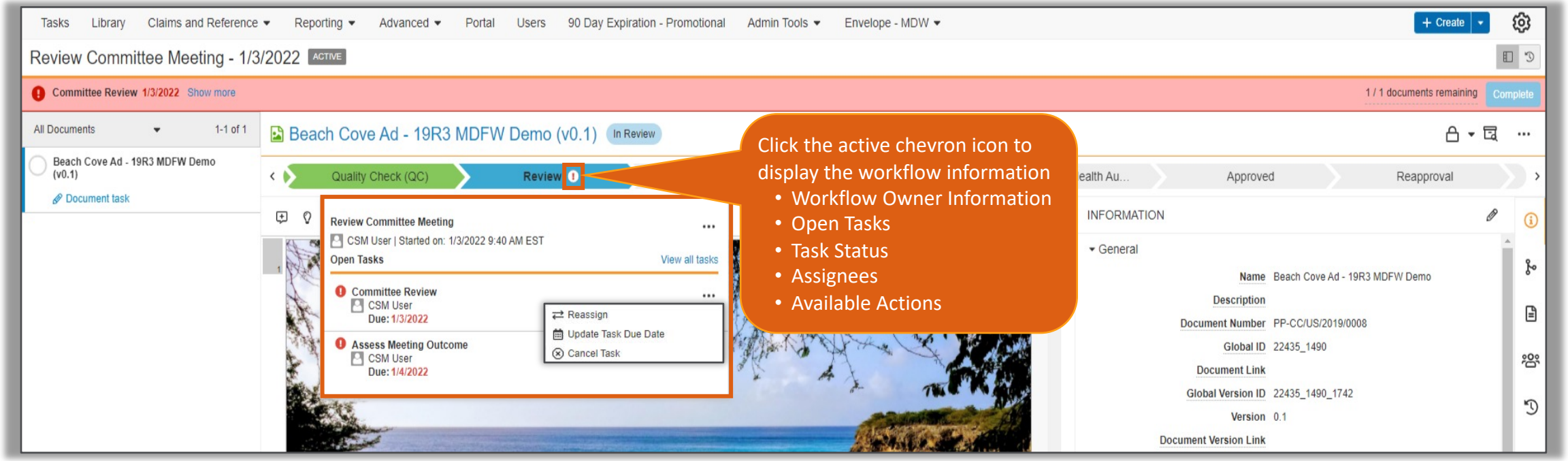
Enhanced Stages Chevron Card for Workflows

- The Lifecycle Stage Chevron card is enhanced to display actions on open tasks as well as additional workflow information



  - Learn more about Configuring Lifecycle Stages

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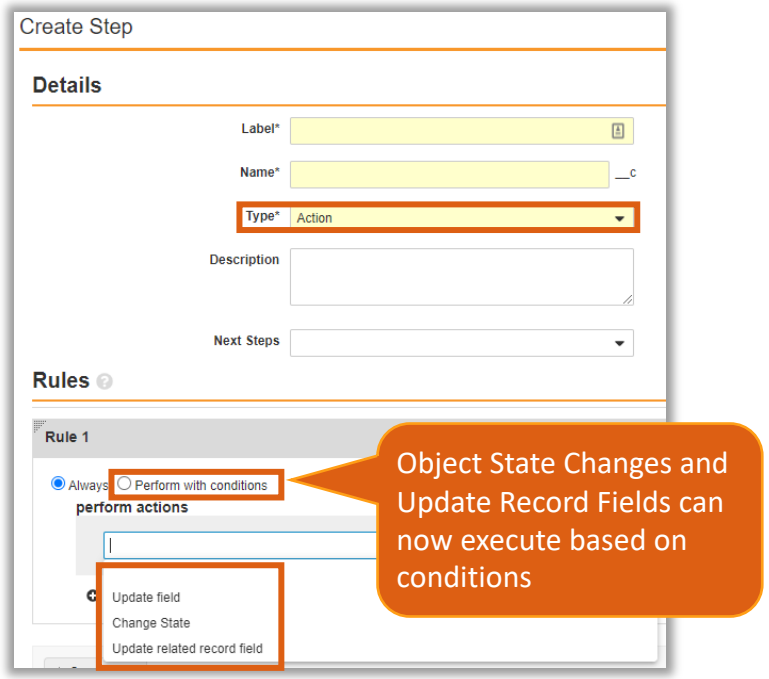
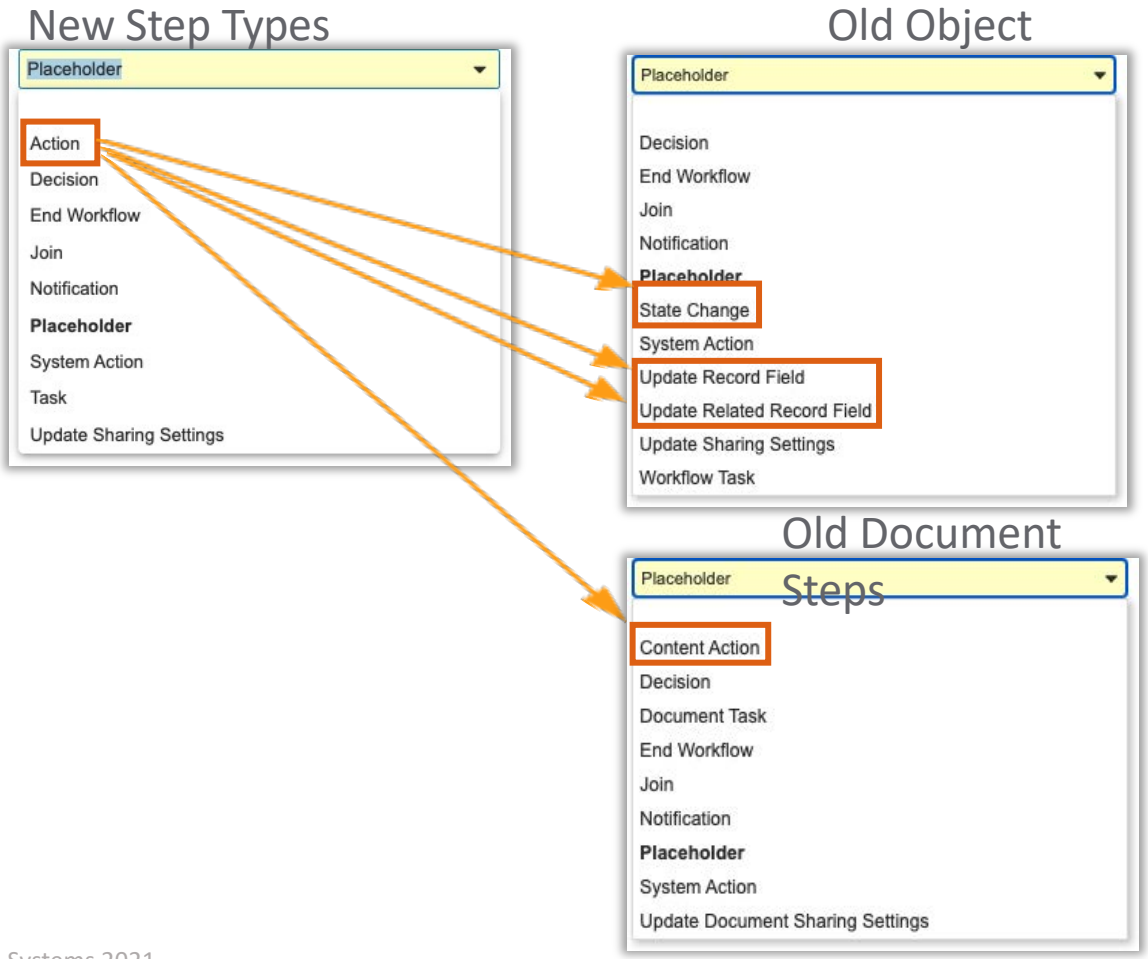
Consistent Steps Across Workflows

- With this release the workflow Action step combines the former object workflow State Change, Update Record Field, and Update Related Record Field steps





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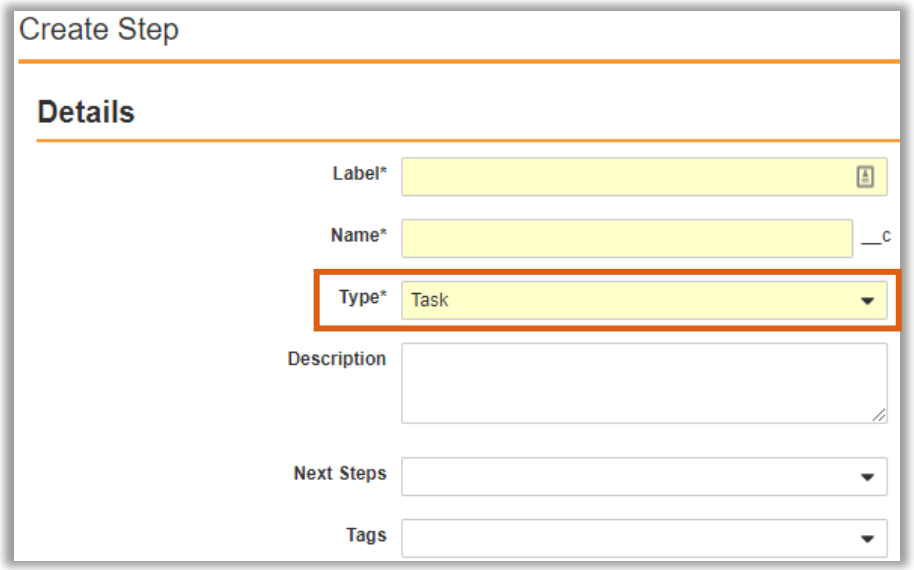
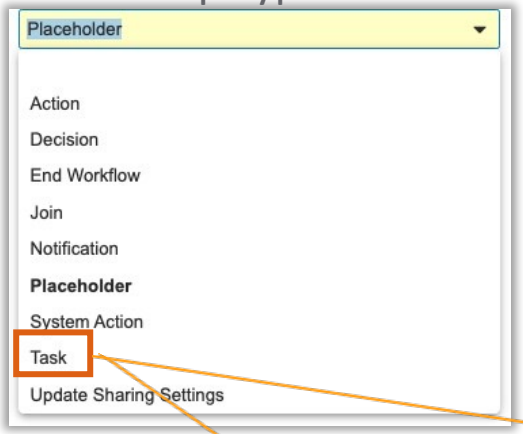
Consistent Steps Across Workflows

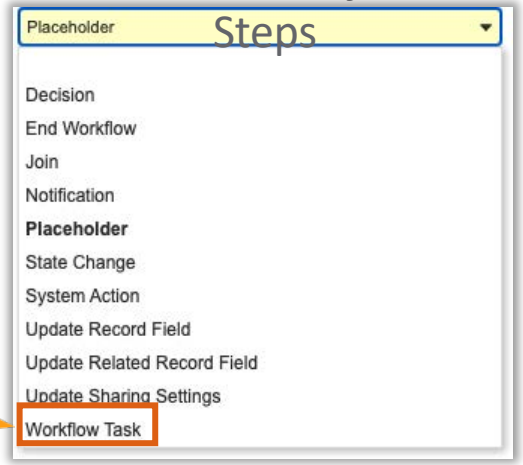
- The Object and Document workflow Task steps are relabeled to ‘Task’



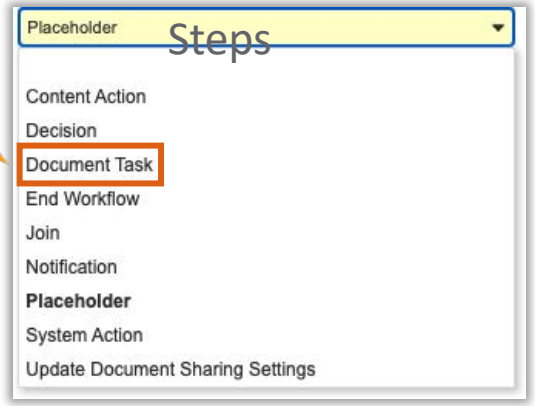
New Step Types



Old Object Steps



Old Document Steps



- Considerations
  - No changes are required to existing configurations
  - Learn more about configuring workflows on Documents and Objects

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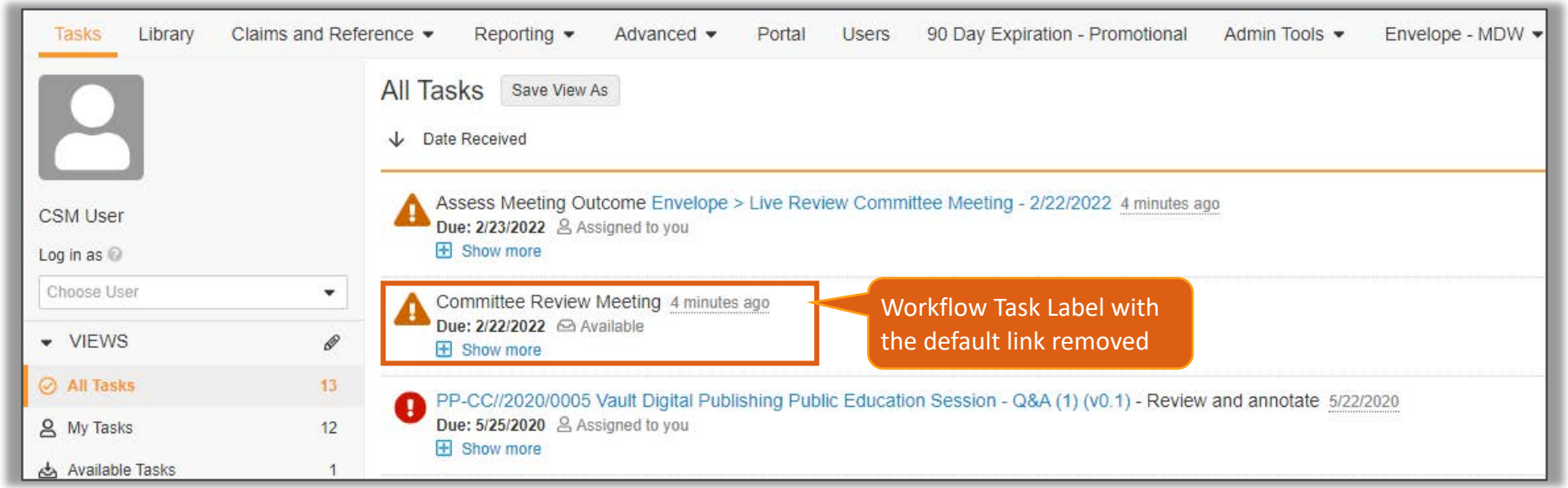
Remove Default Task Link in Label

- This feature allows Admins to turn off the default link provided with the Workflow Task label



- Considerations
  - Learn more about configuring Document Workflows and Object Workflows

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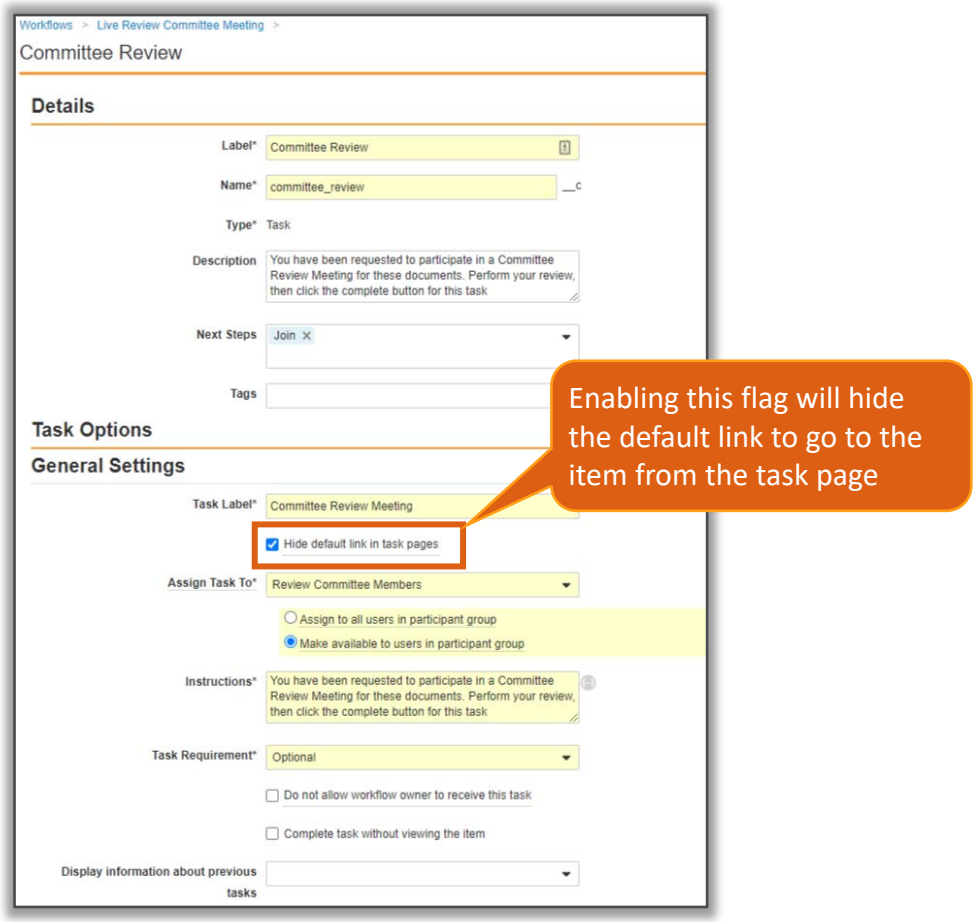
Remove Default Task Link in Label

- Configuration
  - Admin > Configuration > Workflow > [Workflow] > Edit Task



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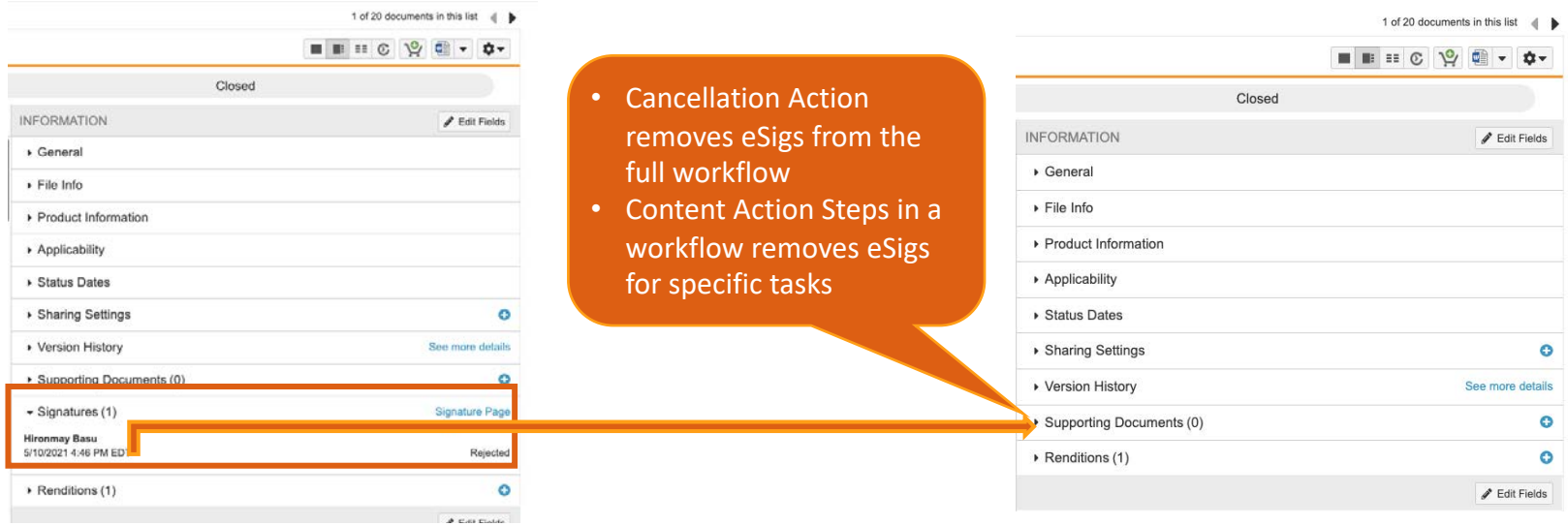
Remove eSignature from Documents

- A new workflow cancellation action called ‘Remove eSignature from Documents’ removes all eSignatures applied to documents in the Envelope
  - This feature allows eSignatures to be removed from a document when a workflow is cancelled, manually or automatically using a Workflow Cancellation Action or a Content Action



- Considerations
  - All eSignatures for the current workflow will be removed from the documents in the envelope
  - eSignatures can only be removed on the current active workflow, and can be removed for a specific task and verdict
  - Removed eSignatures are tracked in the document’s audit trail
  - Learn more about Configuring Document Workflows

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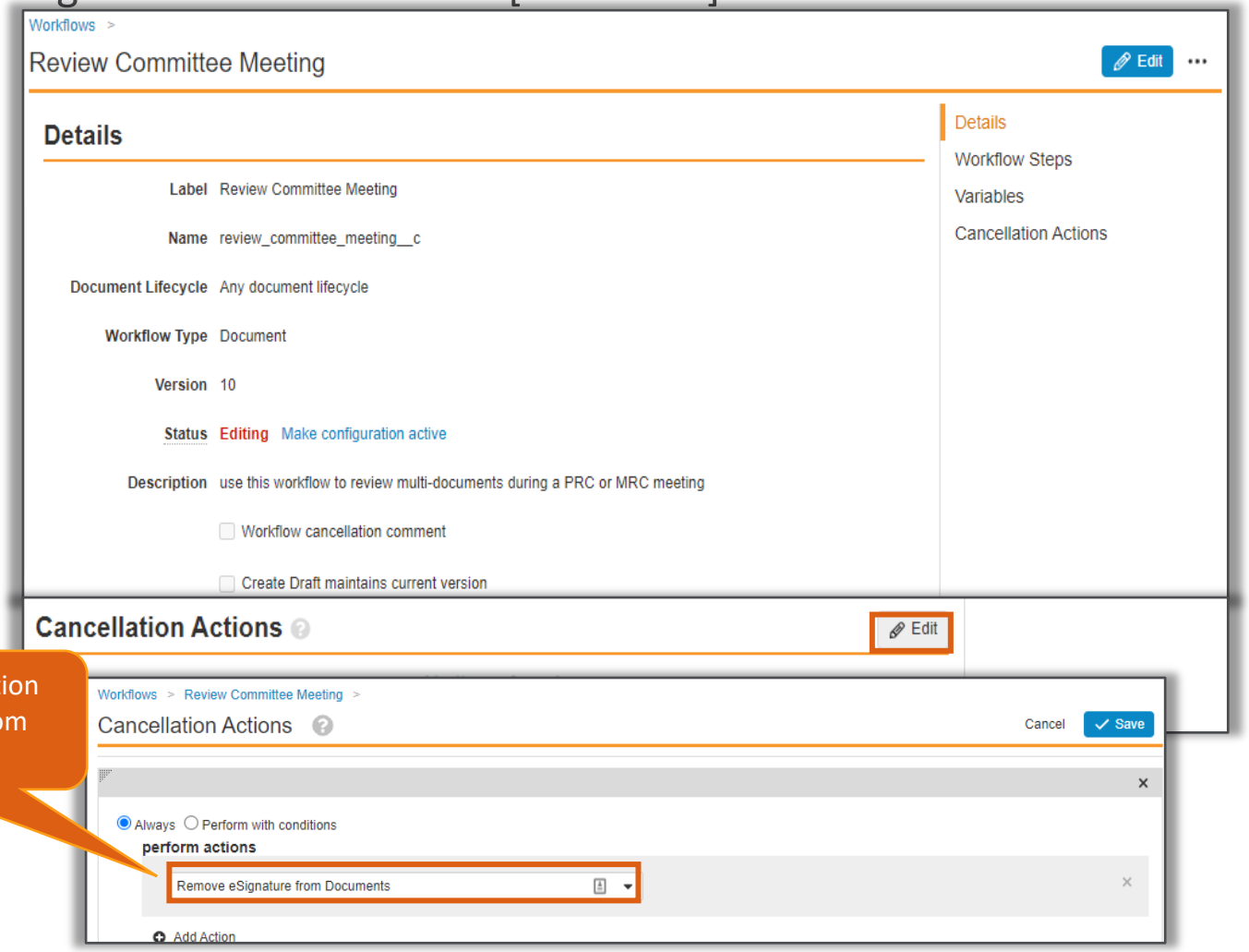
Remove eSignature from Documents

- Configuration
  - Admin > Configuration > Workflows > [Workflow] > Cancellation Actions > Edit



Add the cancellation action 'Remove eSignatures from Documents'

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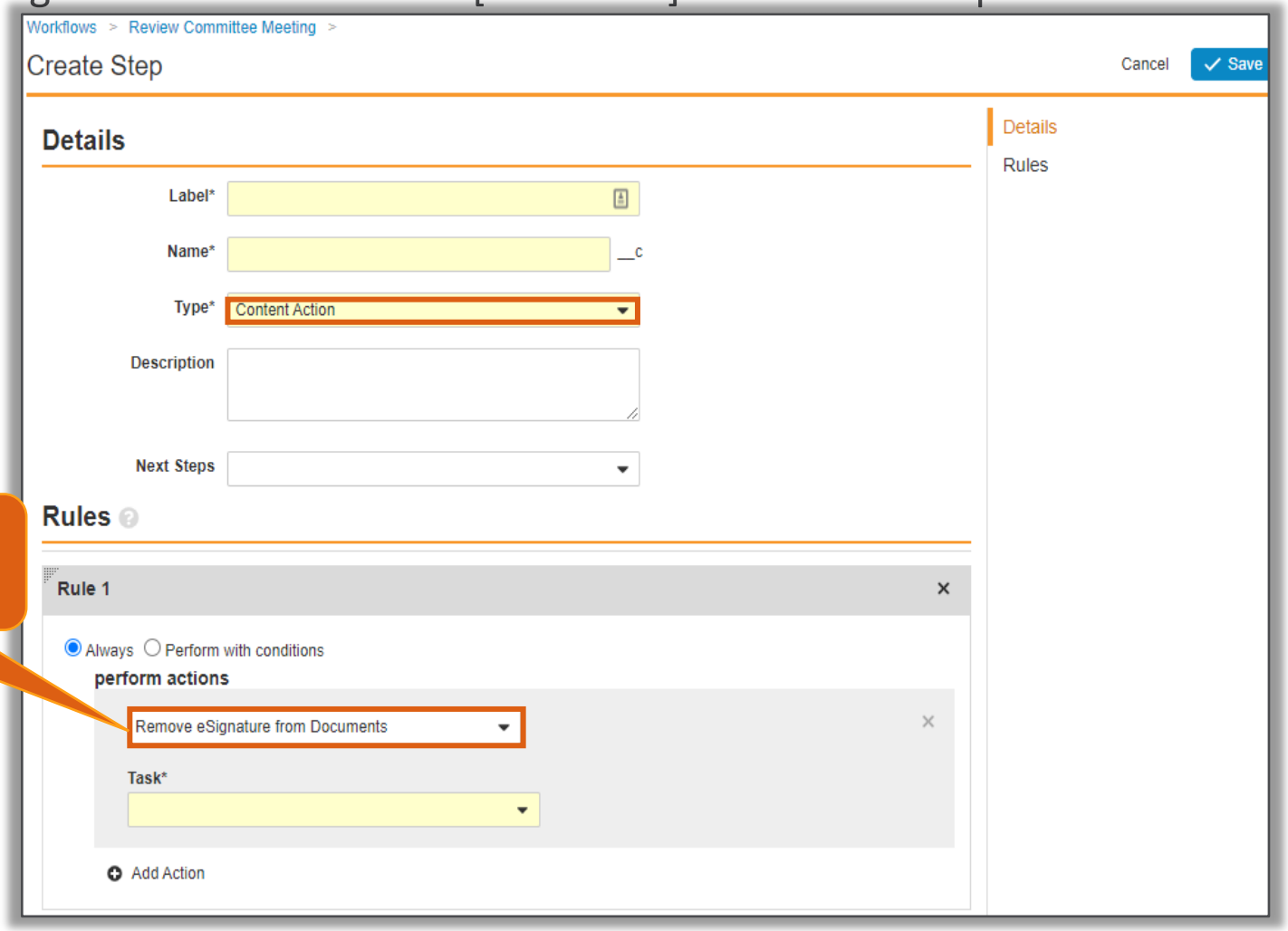
Remove eSignature from Documents

- Configuration
  - Admin > Configuration > Workflows > [Workflow] > Workflow Steps > Create Content Action



Add a Content Action Rule to 'Remove eSignatures from Documents'

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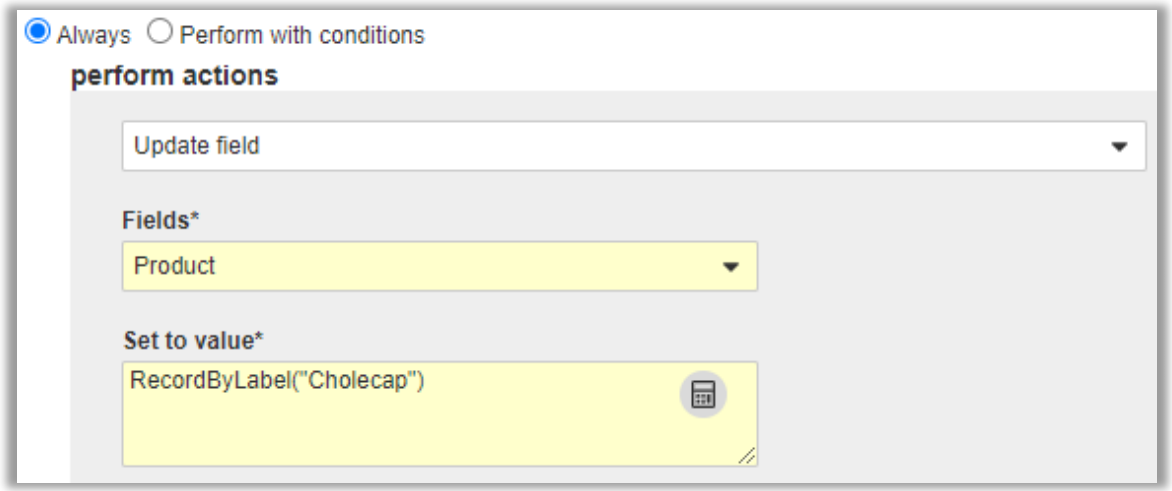
Populate Object Reference Fields with Workflows & Lifecycles

- This feature allows Workflows and Lifecycles to populate object reference fields using the new function RecordByLabel() in an expression
  - Workflow Actions for Objects and Documents, and Lifecycle Entry Actions and Event Actions are currently supported
  - Learn more about configuring Entry Actions for Object Lifecycles, Object Workflows, Document Workflows, Document Lifecycles
- Configuration
  - Admin > Configuration > Document / Object Lifecycle > [Lifecycle] > [State] > Entry Action > Edit > Create Entry Action



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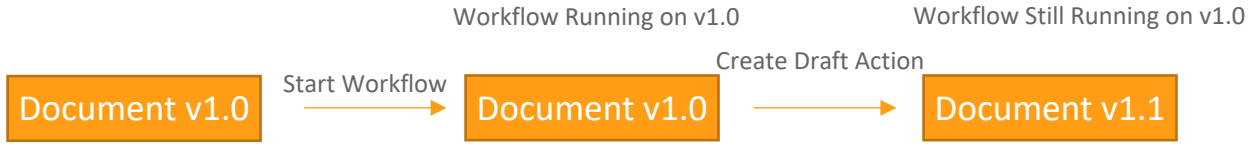
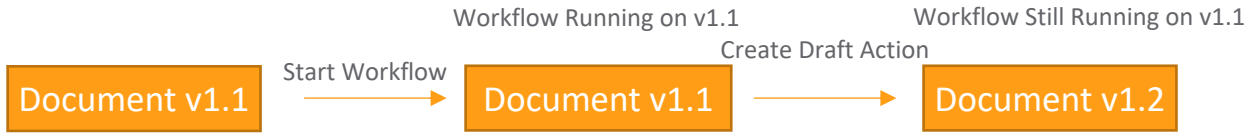
Bound Version Create Draft

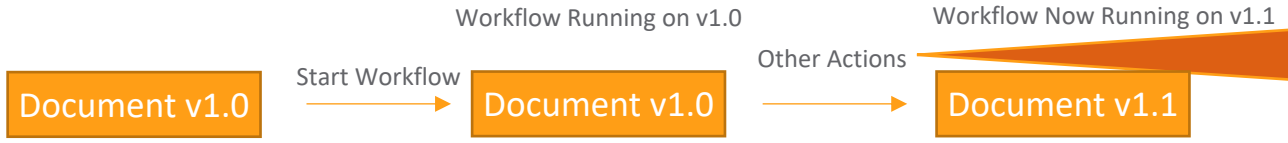
- This feature allows workflows to remain on the current version of a document when the Create Draft Action is performed
  - Example scenarios
    1. Workflow running on major version and create draft occurs



    2. Workflow running on minor version and create draft occurs



- Considerations
  - By default, all workflows on documents continue with the latest version of the document
    - Workflow running on major/minor version and an action other than create draft occurs



Example of Other Actions:
- Upload a new version
- Check-in and Check-out
- Save to Vault on Collaborative Authoring

  - Learn more about Configuring Document Workflows

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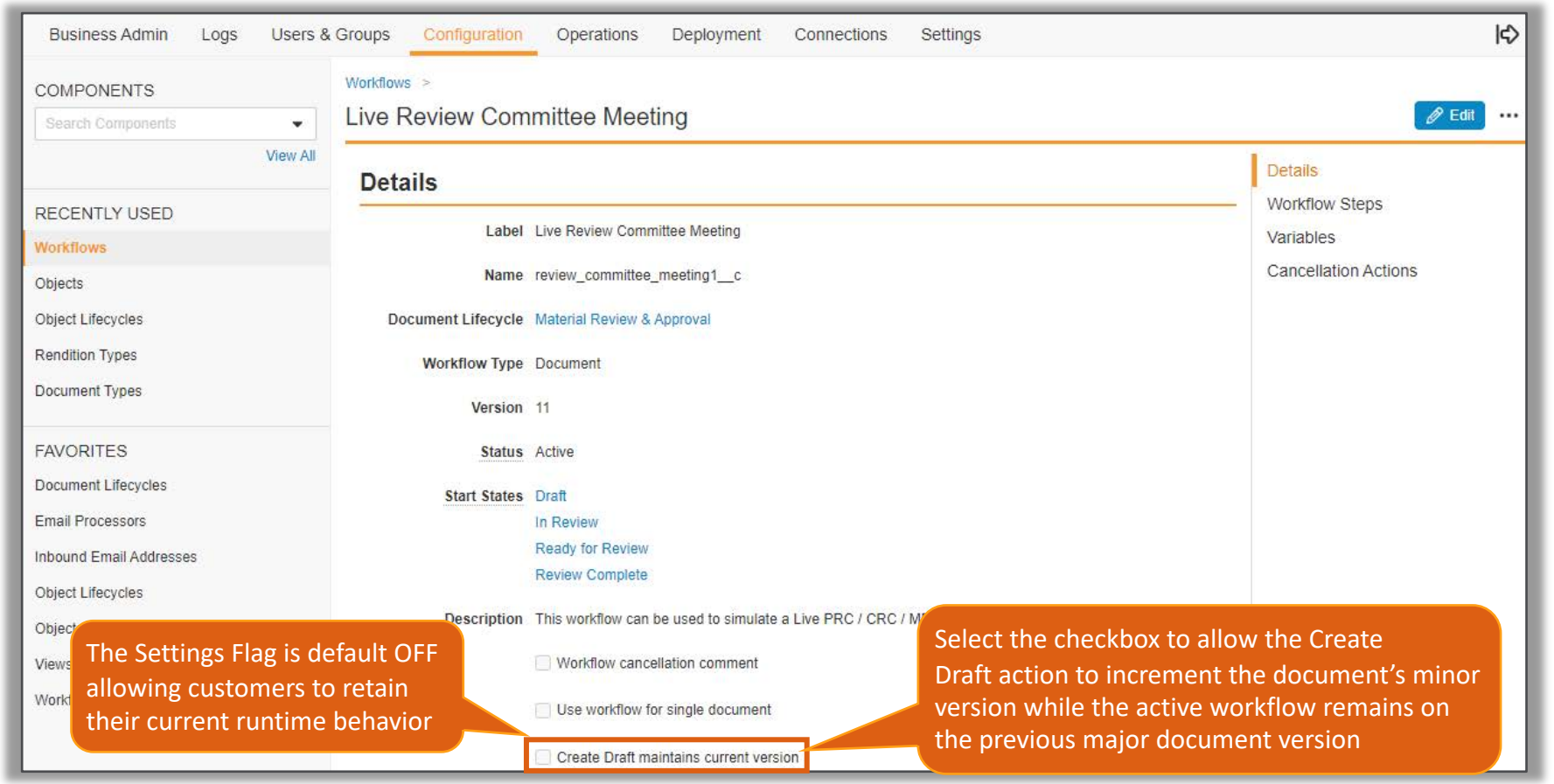
Bound Version Create Draft

- Configuration
  - Admin > Configuration > Workflow > [Workflow] > Enable ‘Create Draft Maintains Current Version’



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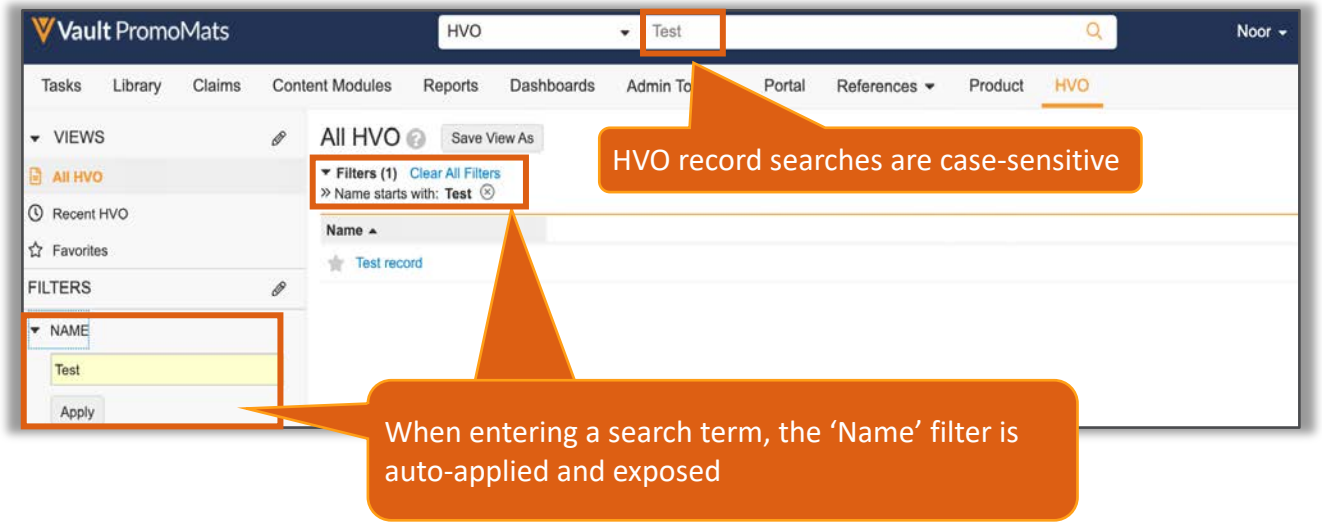
Searching & Filtering

HVO Tabs: Search by Name from the Top Search Box

- When navigating to a High-Volume Object (HVO) tab, users can now use the search box to quickly find HVO records by name



- Considerations
  - The user can change the search term from both the search box and the 'Name' filter
  - Advanced search is not supported on HVO
  - Learn more about High-Volume Objects

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Field-Centric Strict Matching

- Vault's 'Strict Matching' search functionality is now field-centric, meaning that the minimum required matching terms must be in the same field in Vault rather than split between multiple fields, allowing for more precise search results
  - The 'Strict Matching' Search setting applies the following requirements to searches
    - Searches with one or two terms require all terms to match
    - Searches with three or four terms require all but one term to match
    - Searches with five or more terms require all but two terms to match

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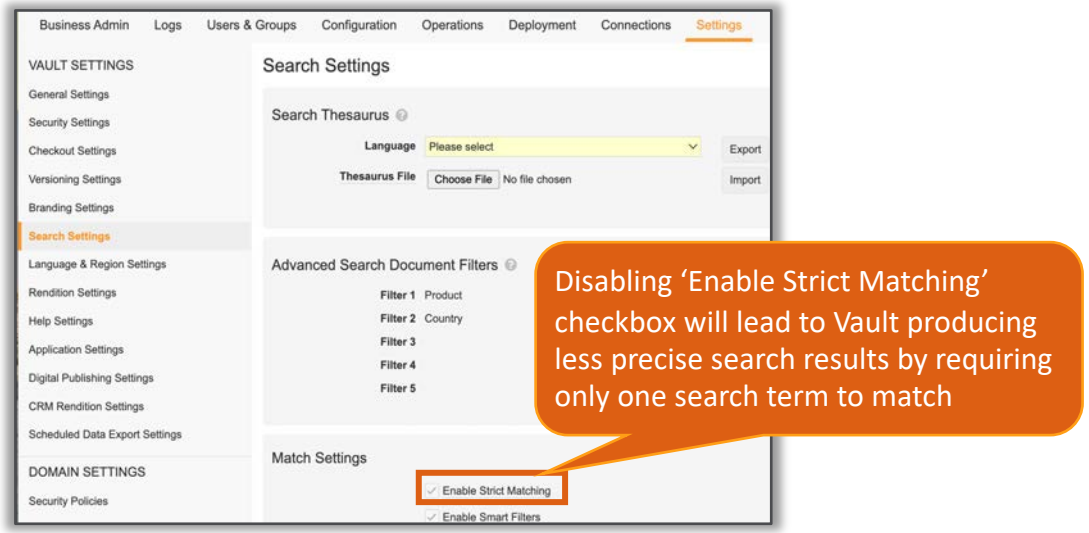
Field-Centric Strict Matching

- Considerations
  - To access Strict Matching: Admin > Settings > Search Settings > Enable ‘Strict Matching’



  - Learn more about Strict Matching

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Multidirectional & Phrase Synonyms

- Vault's thesaurus feature has been enhanced in several ways:
  - Multidirectional searches are now available, allowing Vault's search to expand to all entries and synonyms available in a row
  - Each thesaurus row supports a total of 250 characters across the 5 entry and 15 synonym columns

Up to 5 'Entry' columns
- Phrases are supported as entries

'Multidirectional' column
- True: expands the search to all entries and synonyms available in a row
- False: limits the search to be single directional, entry words to synonyms

Up to 15 'Synonym' columns

	A	B	C	D	E	F	G	H	I	J	K
1	Entry	Entry	Entry	Entry	Entry	Multidirectional	Synonym	Synonym	Synonym	Synonym	Synonym
2	children	child	young adults			TRUE	adolescent	teenager			
3	Antibiotics					FALSE	amoxicillin	augmentin			

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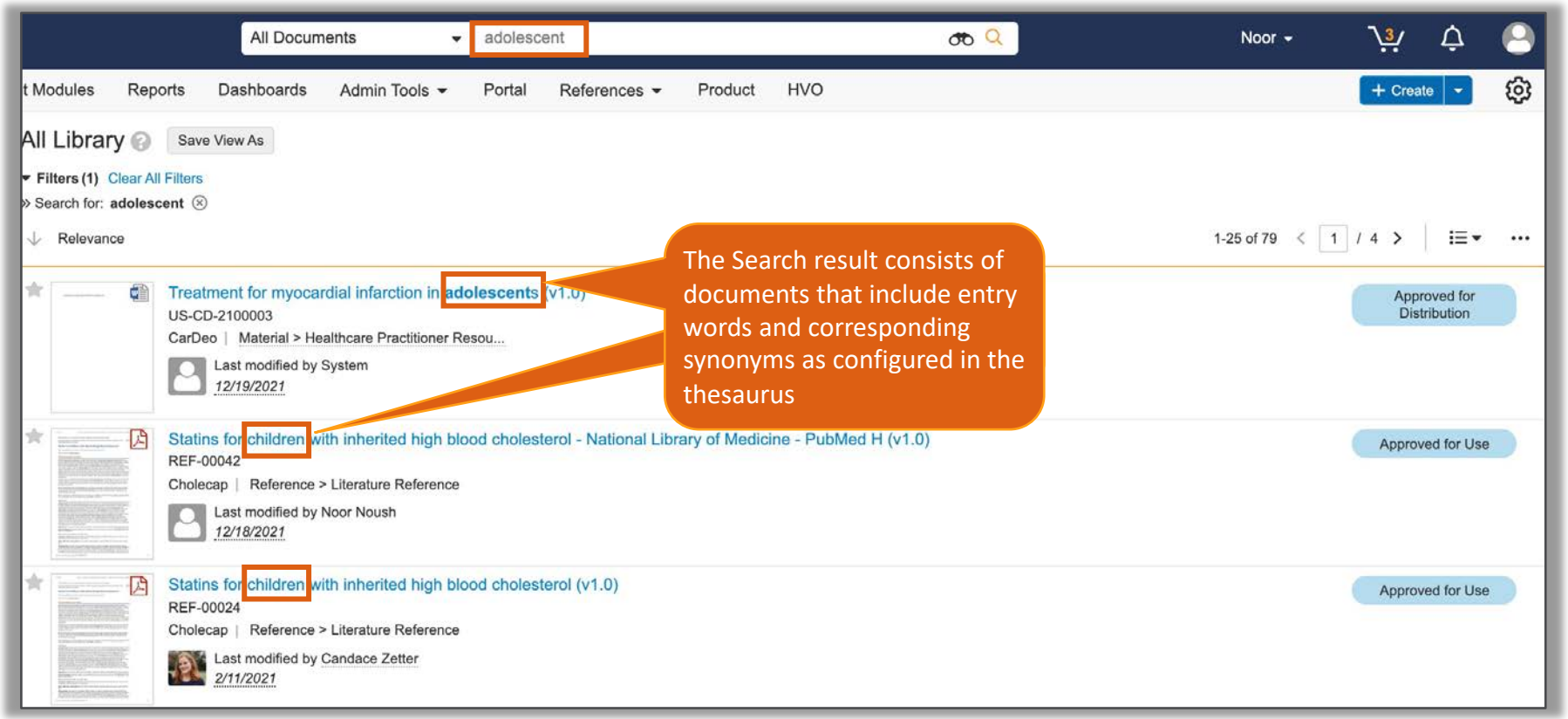
Multidirectional & Phrase Synonyms



- Considerations
  - All existing thesaurus entries will continue to work as created
  - Support for special characters on Entries
    - @ # $ % & . -

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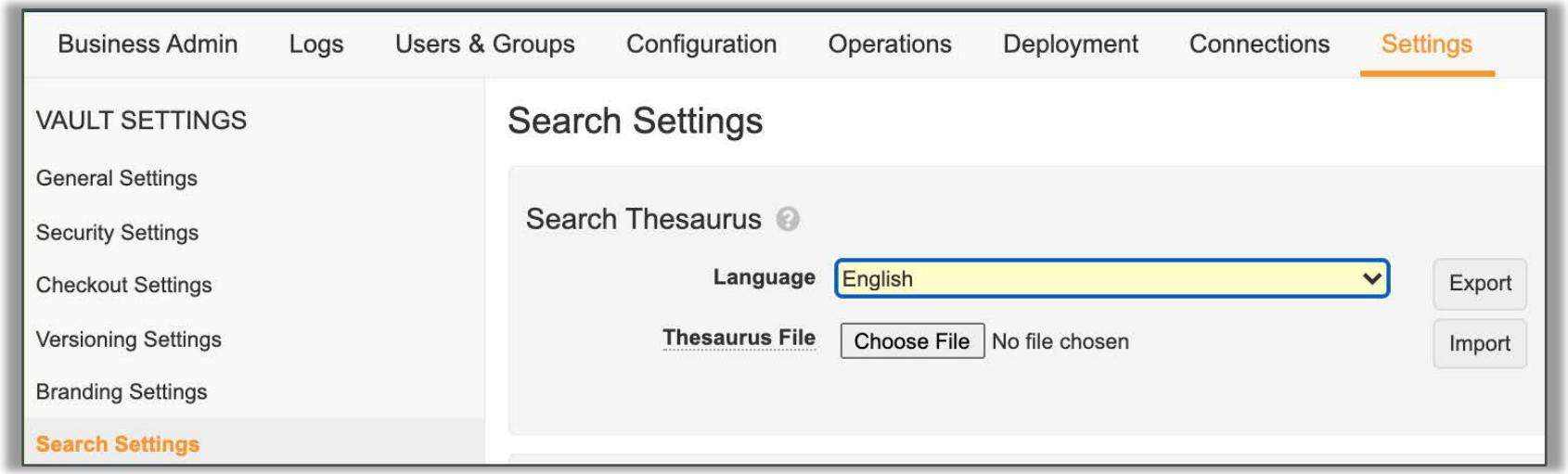
Multidirectional & Phrase Synonyms

- Configuration
  - Admin > Settings > Search Settings > [Language] > Export



    - Modify Thesaurus file with entries, synonyms and indicate relationship to be one-way (FALSE) or multidirectional (TRUE)
  - Admin > Settings > Search Settings > Choose [Thesaurus File] > Import
  - Thesaurus files are exported and imported in UTF-16 Unicode Text (.txt)
  - Learn more about Configuring Search Synonyms

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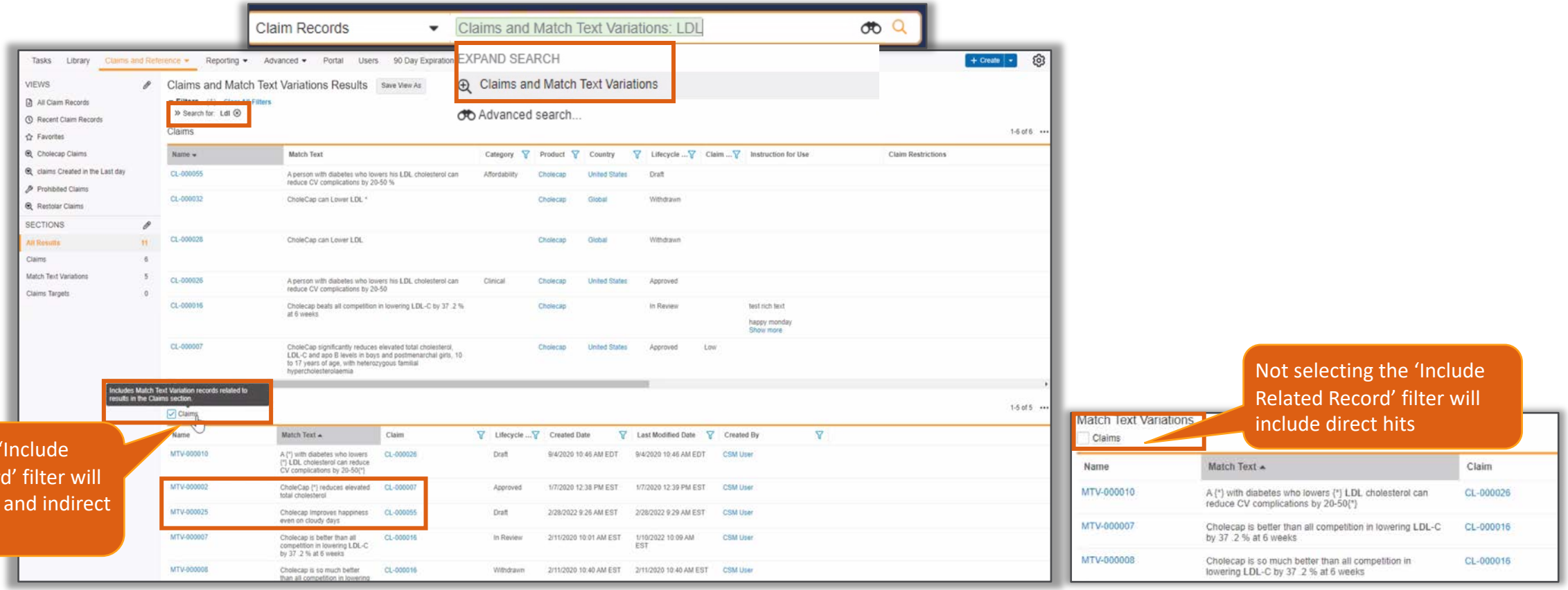
Expanded Search with Related Records

- Search Collections search terms no longer need to exist on a record for them to be returned in the search results - the record only needs to have a relationship to a matching record
  - A new '*Include Related Records*' option will be available for each object included in the Search Collection



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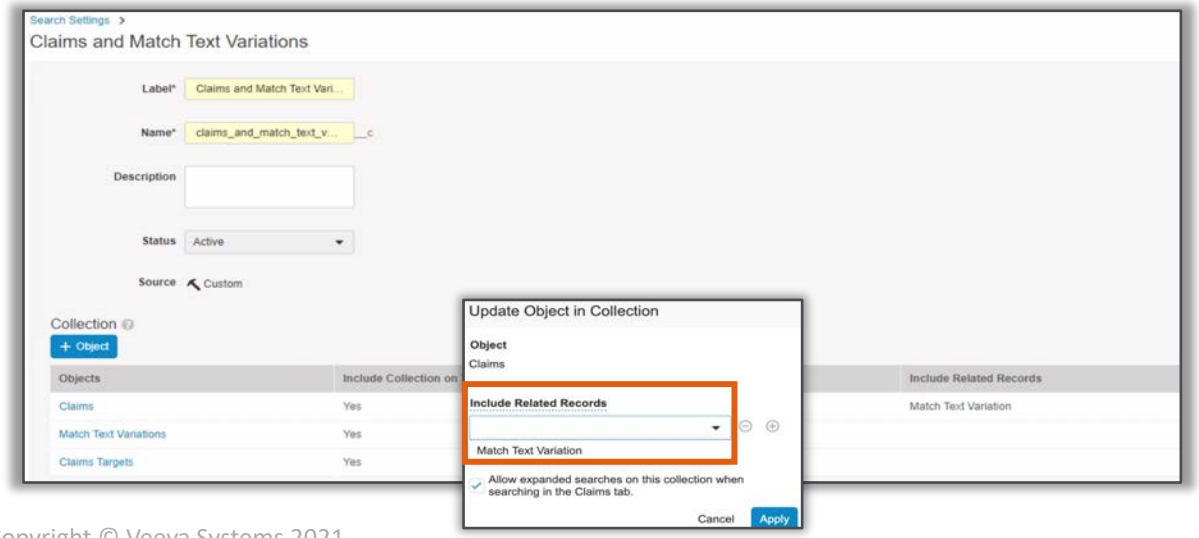
Expanded Search with Related Records

- Considerations
  - Only related objects that are included in the collection will be available for selection in the ‘Include Related Records’ selector.
    - If there are no related objects in the collection, the selector will be greyed out
  - A maximum of three relationships can be added across the objects in a collection
  - The related records are only returned if there are fewer than 5,000 results
    - When limits are reached, users are instructed to filter down the object on the other side of the relationship
- Configuration
  - Admin > Settings > Search Settings > Search Collections > [Search Collection] > Edit > [Object] > Edit > Include Related Records
  - Learn more about Configuring Search Collections



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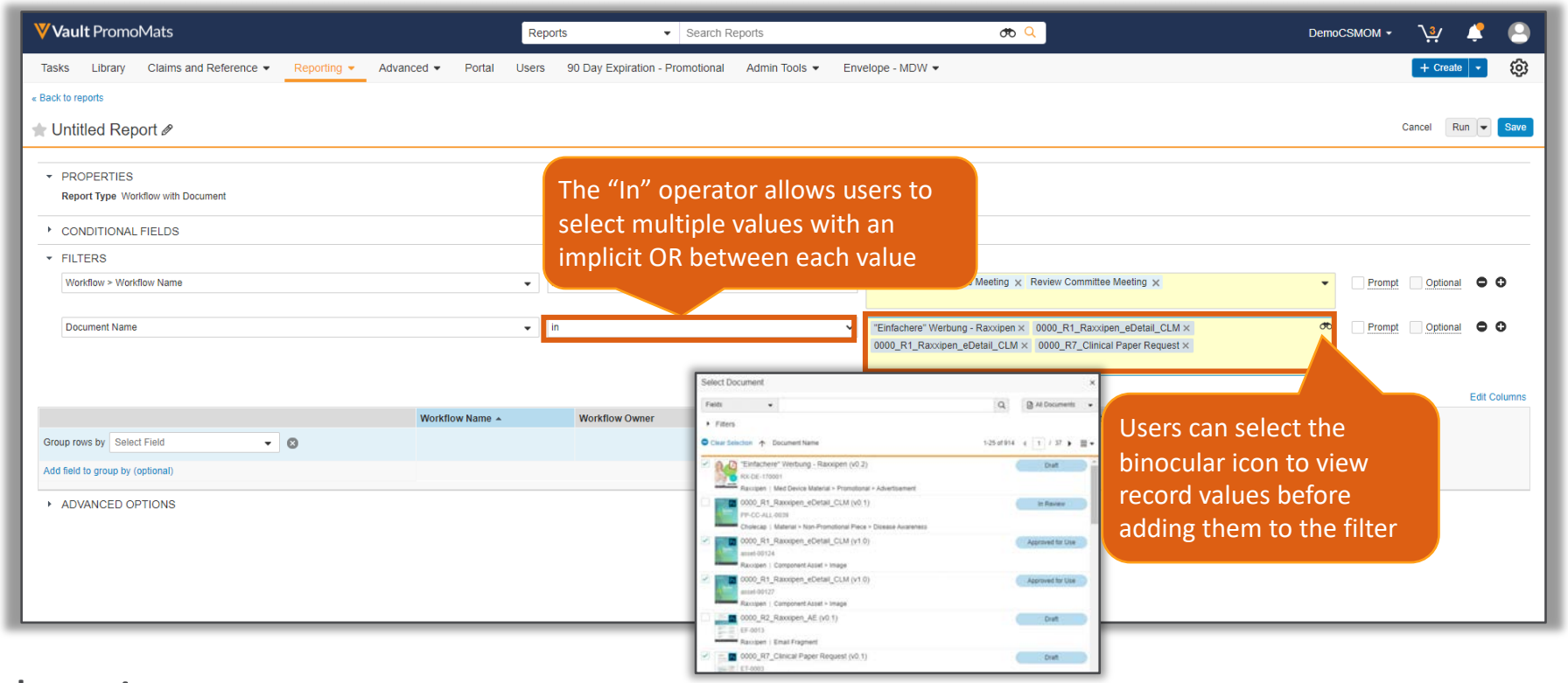
Reporting

In Operator for Name Report Filters

- Vault report filters now support the conditional “In” operator for Object, Document, and Workflow name fields



- Considerations
  - User can select up to 100 name values in a single filter
  - Learn more about Using Report Filters

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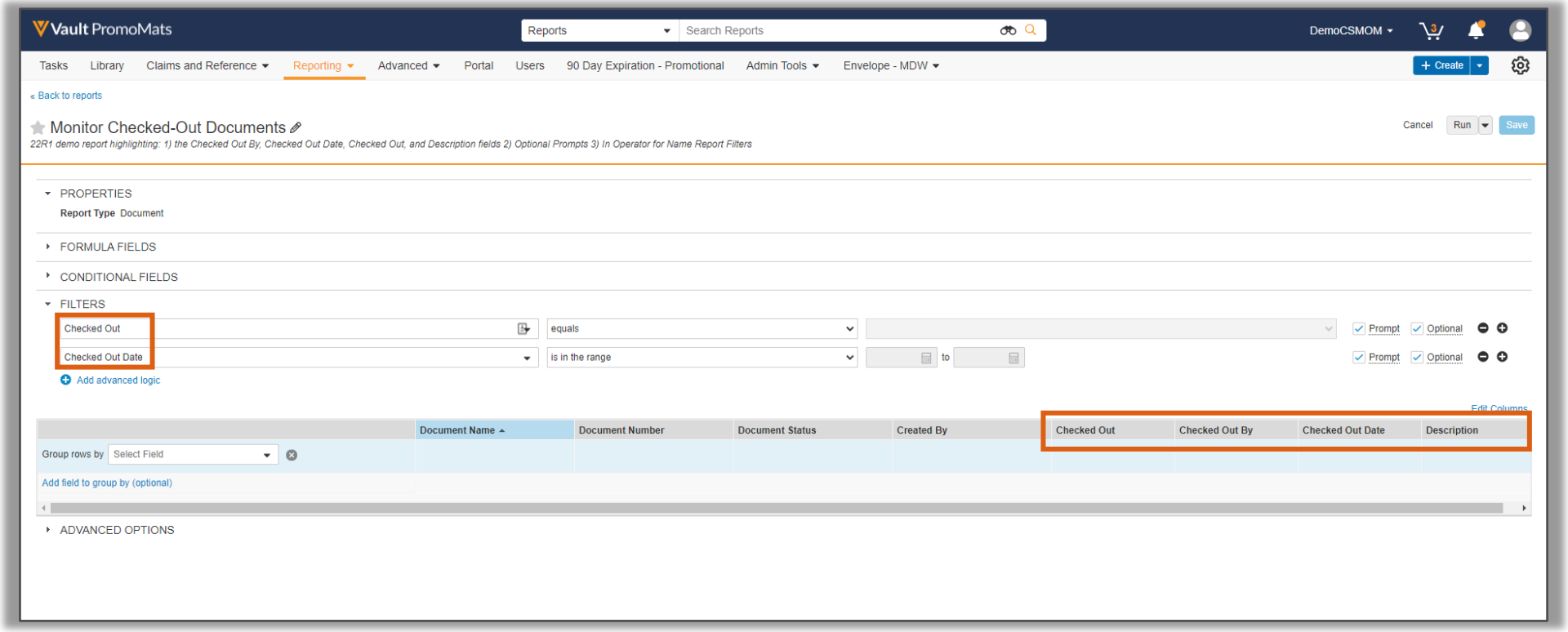
Additional Document Field Support in Report

- Document reports now support the Checked Out, Checked Out By, Checked Out Date, and Description fields as report filters, columns, and row grouping
  - Users can leverage these checked out fields to easily identify documents that are currently checked out of Vault
  - Learn more about Using Report Filters



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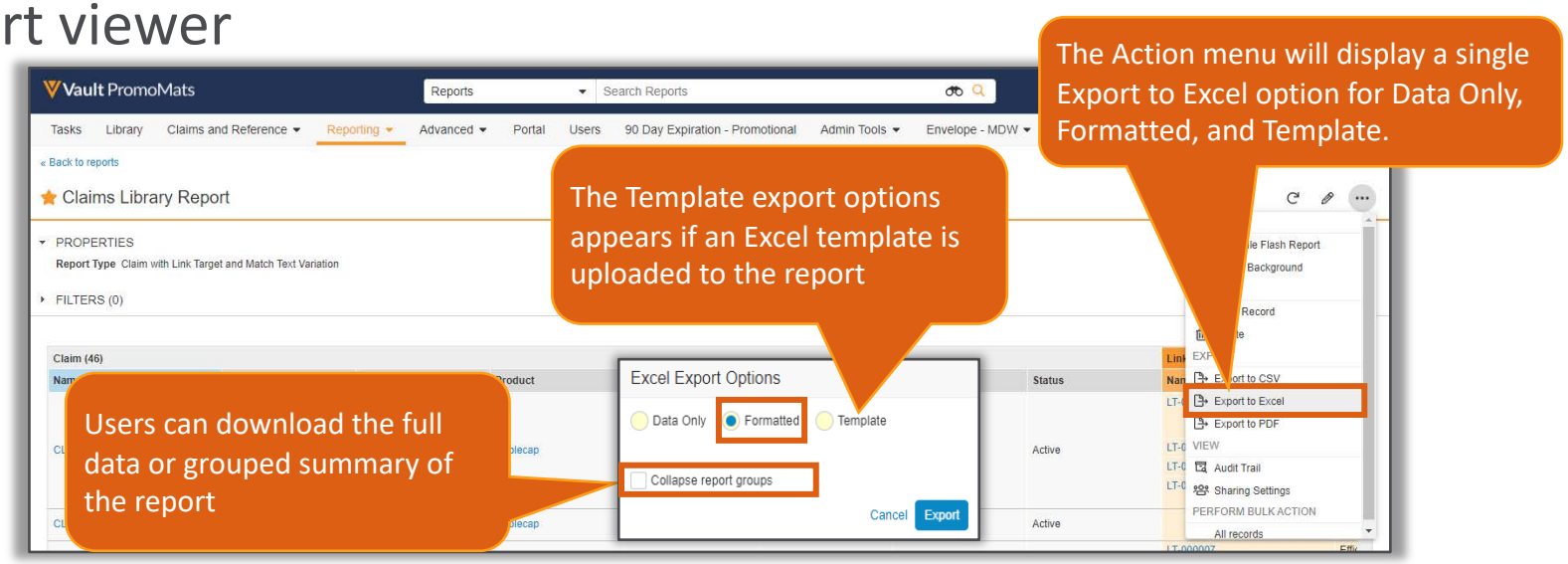
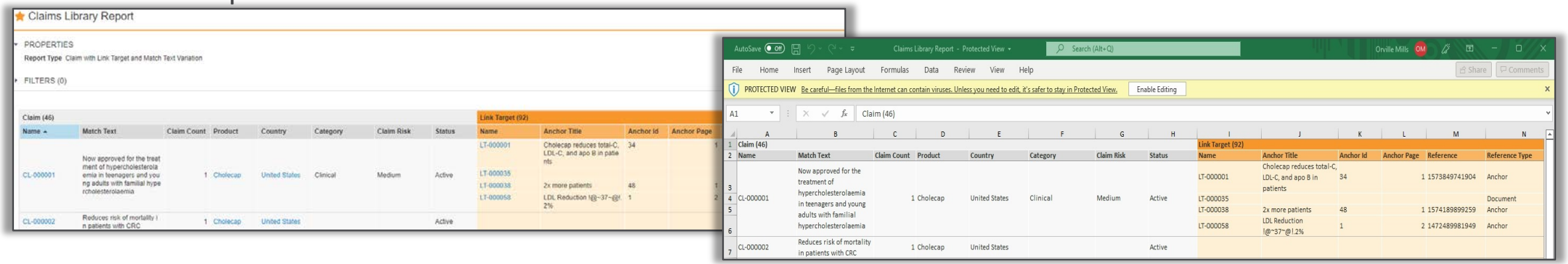
Export Report to Formatted Excel

- This feature provides an easy option to download a Vault report as it is displayed in the report viewer



  - The downloaded Excel file will maintain the headers, sub-headers and other visual elements of the report



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Export Report to Formatted Excel

- Considerations
  - Excel has some limitations around fonts, column borders, etc. so in some cases, it might not look exactly as in the report viewer
  - Learn more about Exporting Reports

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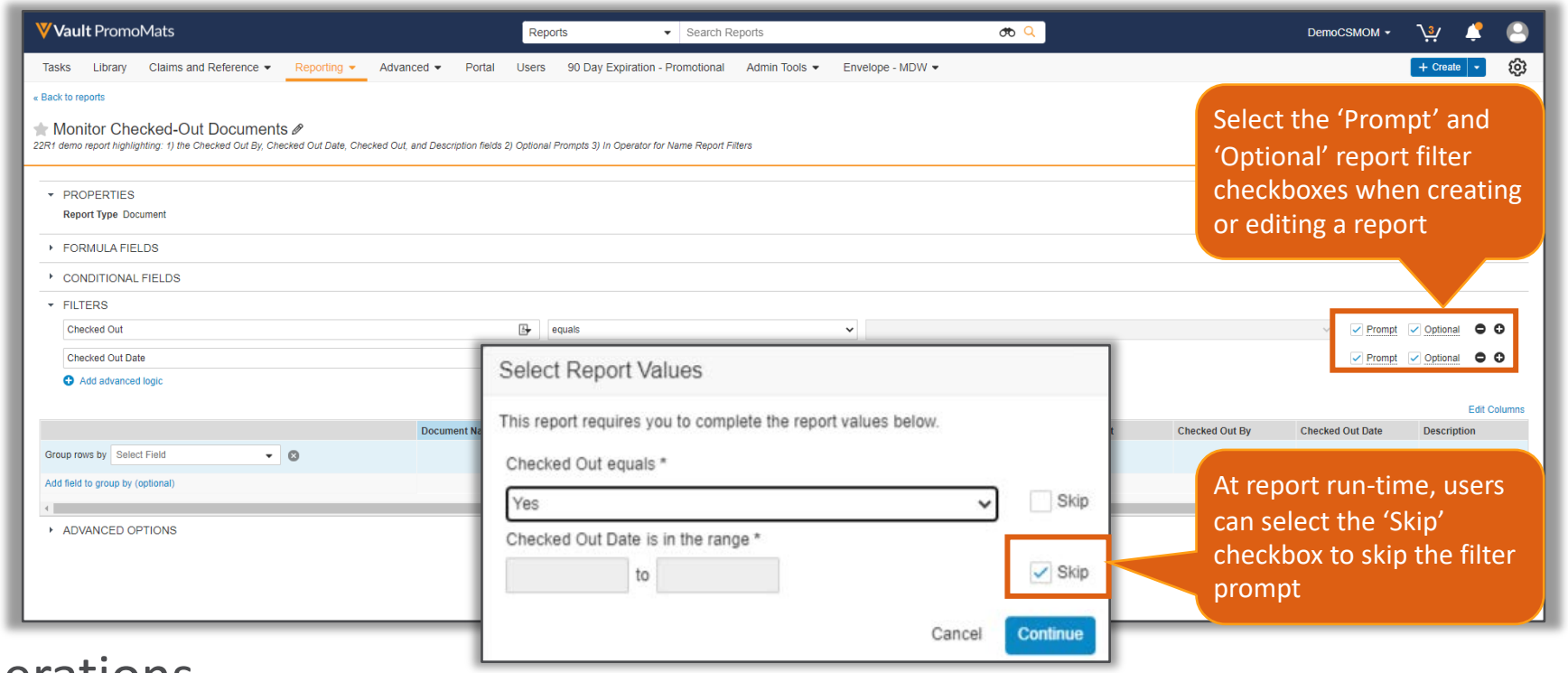
Optional Prompts

- This feature give users the option to skip report prompts before generating a report



- Considerations
  - Report runtimes can significantly increase when skipping object filters with a large number of records
  - Learn more about Using Report Filters

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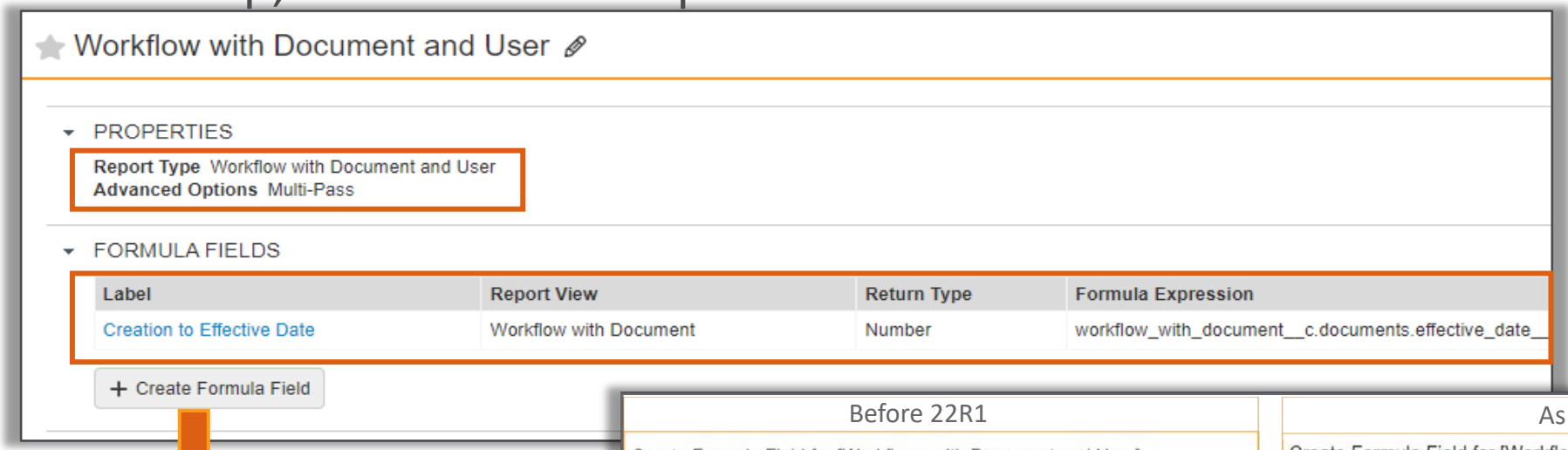
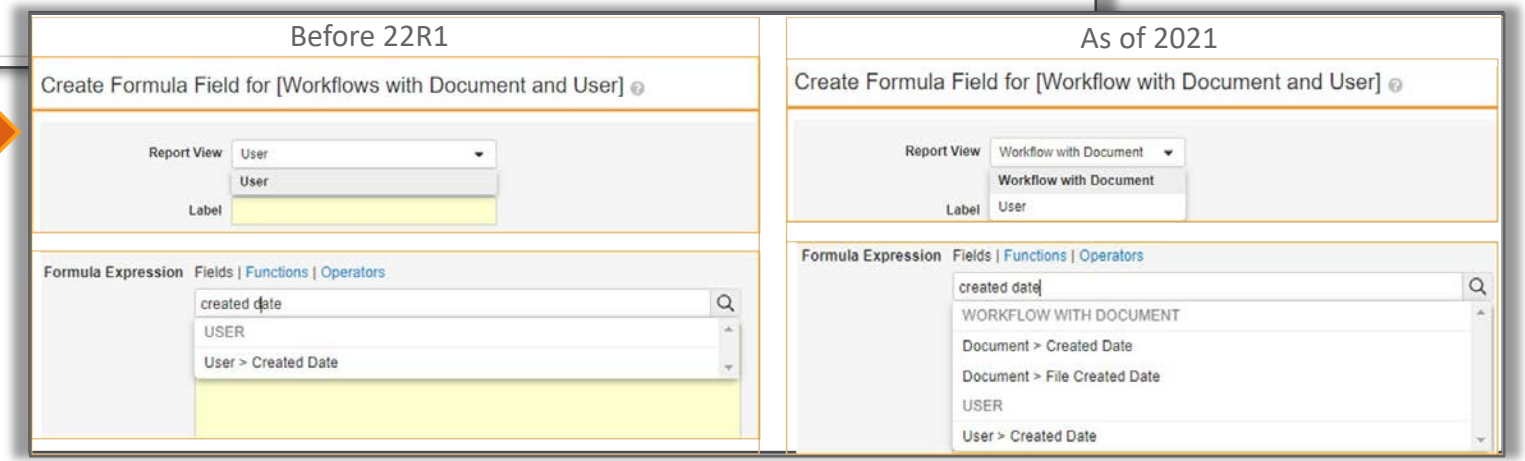
Multi-Pass Formula Fields Enhancements

- Vault now supports formula fields on Multi-Pass reports created using Binder, Relationship, and Workflow report views





  - Learn more about Multi-Pass Reporting

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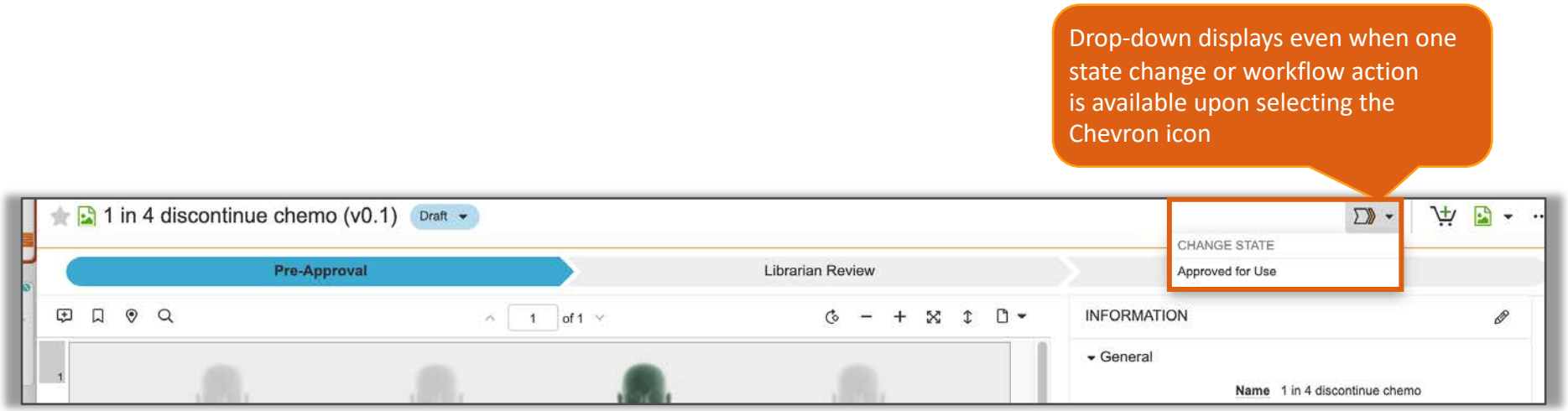
Usability & Interface

Workflow Action Menu: Expose Drop-Down from Chevron for One Action

- An action drop-down menu is now always displayed upon clicking the Chevron icon
  - Prior to 22R1, when only one state change or workflow action was available, clicking the chevron immediately initiated the state change or workflow action



  - Learn more about the Chevron Icon

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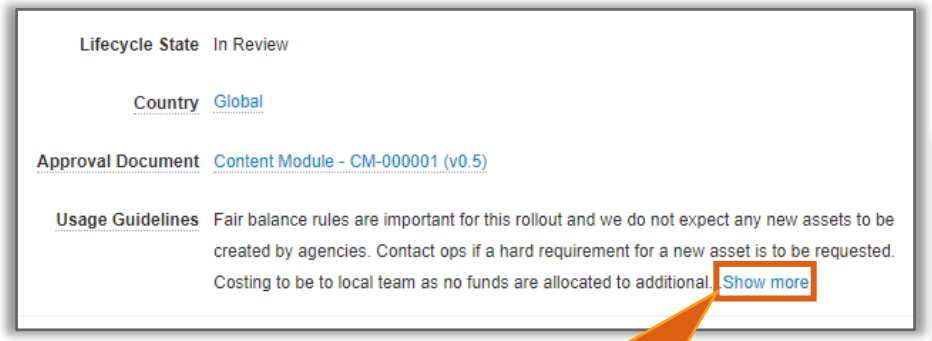
Rich Text/Long Text Pop-up Window Size Update

- The Rich Text and Long Text field pop-up window size is now bigger when viewing a record so that it is the same size as when editing the record



The dialog box opens in the same size when clicking ‘show more’ when viewing or clicking the ’pop up ‘ icon when editing

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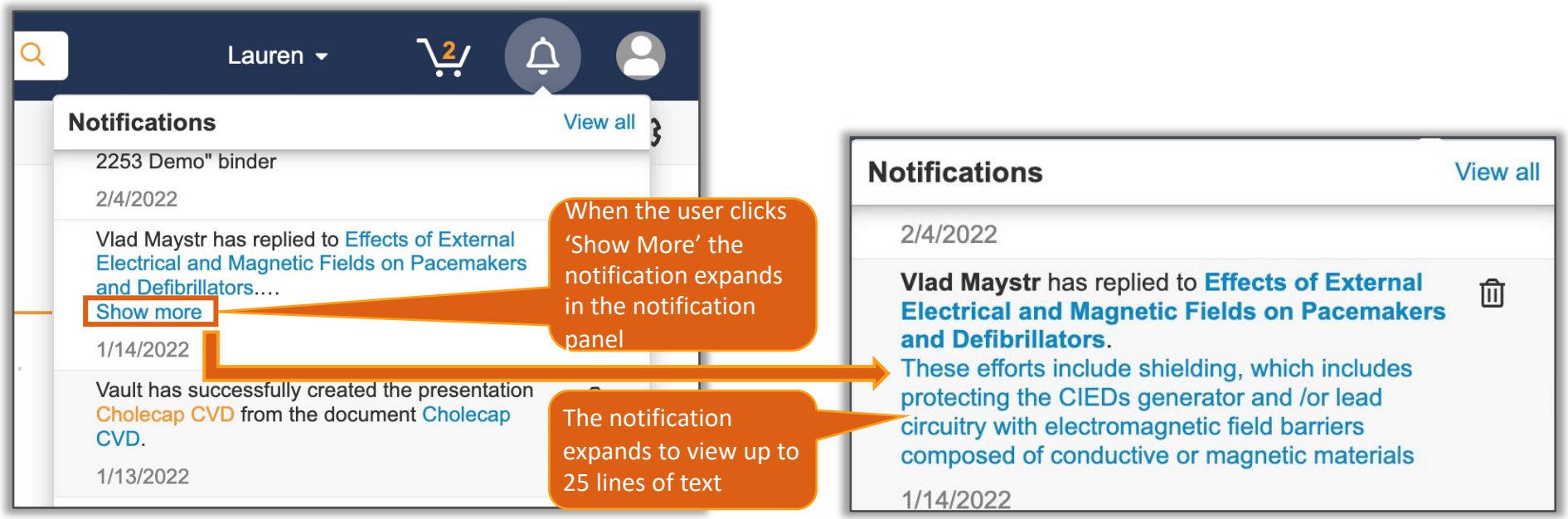
Notifications: View Full Content in Panel

- Users can now expand the content of longer notifications directly within the notification panel to view up to 25 lines of text without opening the notification page



- Considerations
  - If the notification is over 25 lines of text then the notification will include a hyperlink to navigate directly to the full text on the notification page
  - Learn more about Notifications

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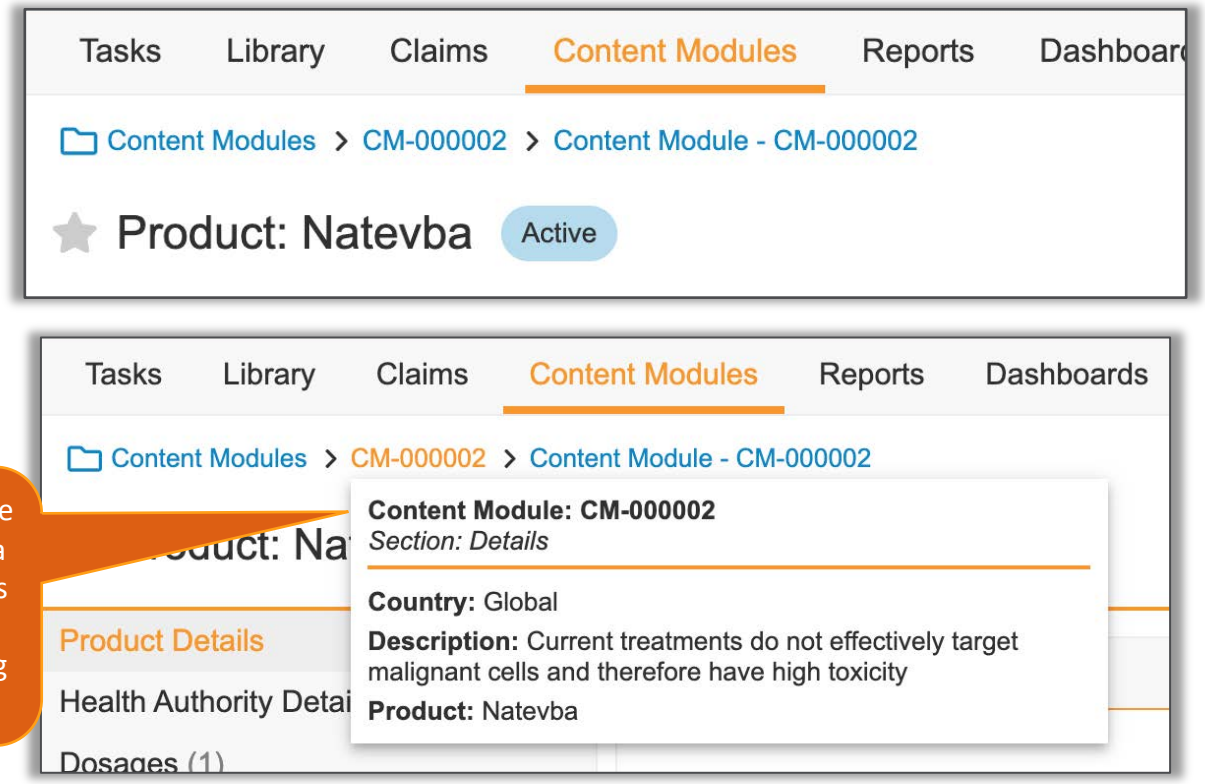
Breadcrumb Enhancements for Object Tabs

- As users view data in an Object tab, each click to view details of a record is tracked by a breadcrumb



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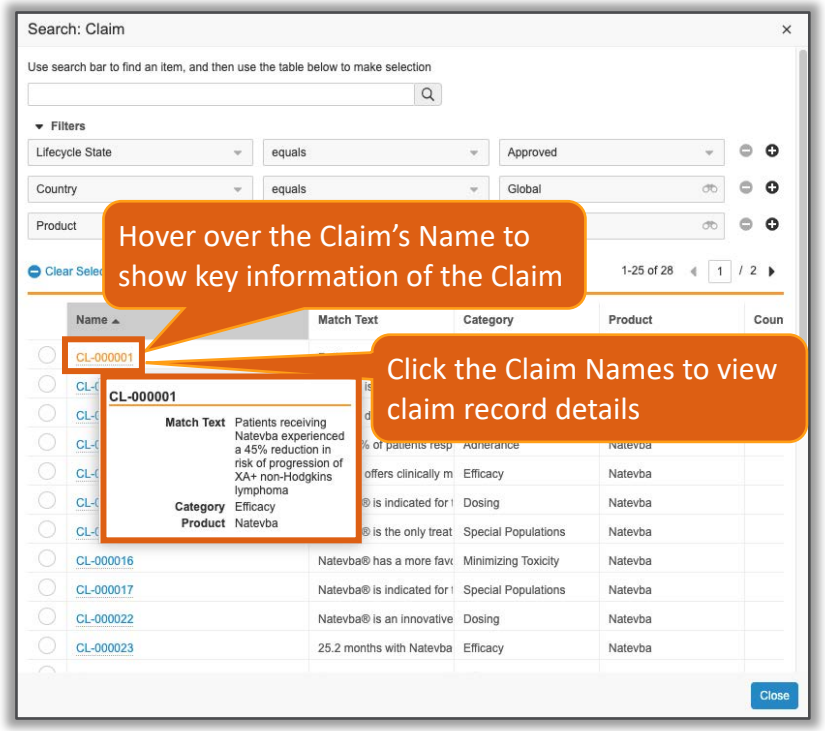
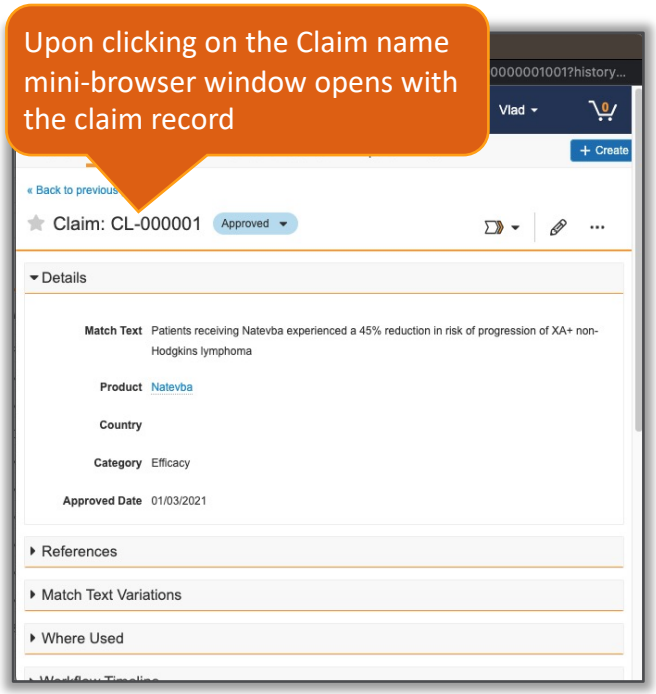
Auto Claims Linking

Auto Claims Linking: View Claim Details from Select Claims Dialog

- Claim record detail visibility while manually linking to Claims is improved
  - Hovering over the Claim Name shows its core information in a hover card
  - Claim record Name's in the grid are now clickable links
  - Clicking on the link opens a mini-browser window for viewing the complete claim record





  - Learn more about Manually Linking to Claims

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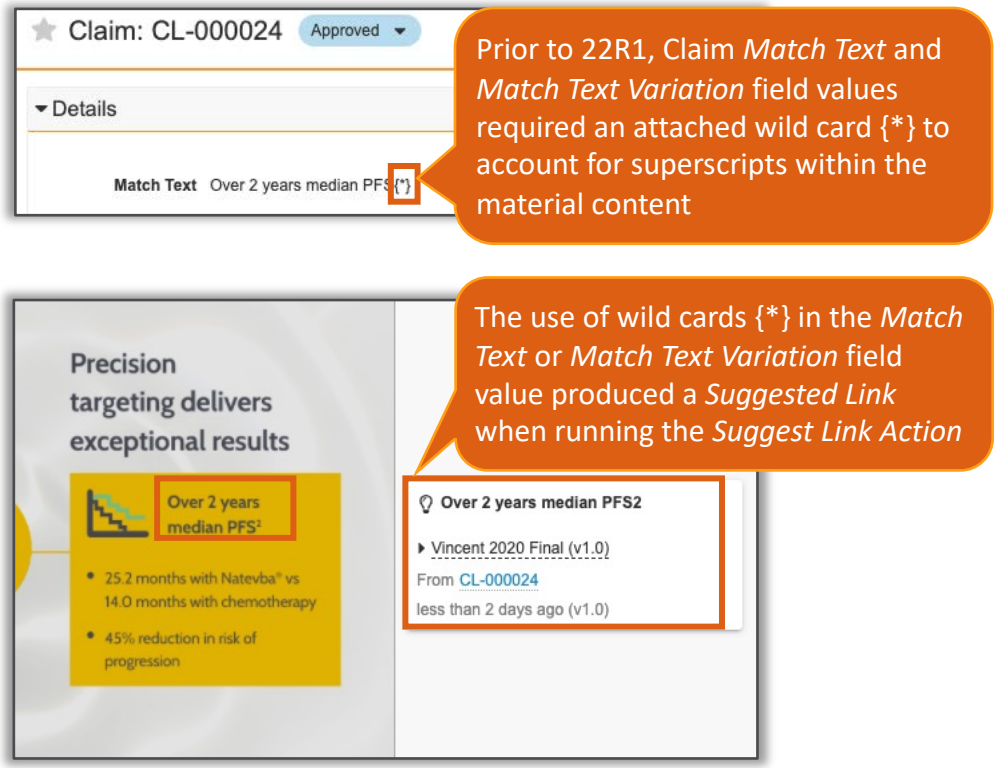
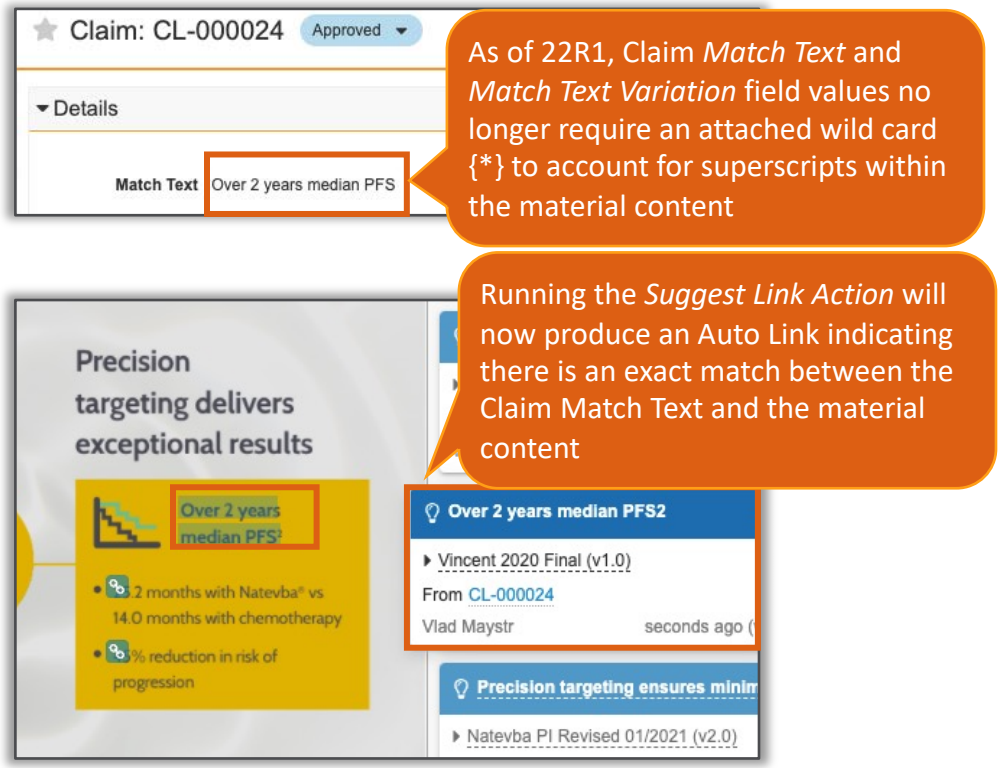
Auto Claims Linking: Ignore Superscript and Subscript Characters When Matching to Claims

- Claims matching logic now ignores superscript and subscript characters placed at the end of words:
  - Improves results of matching between Claims and documents when superscript or subscripts are included in material content





  - Learn more about Configuring Auto Claims Linking

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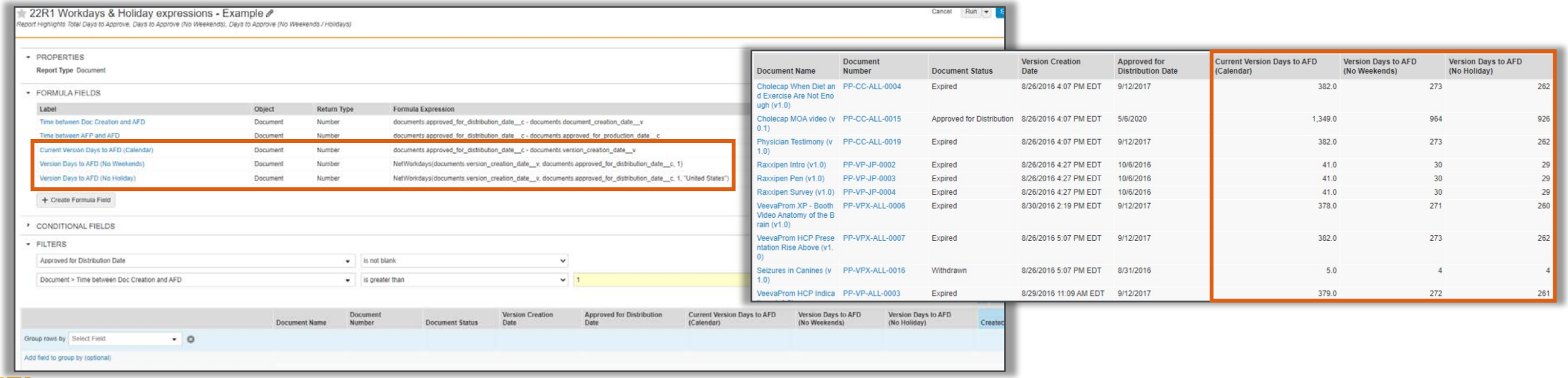
Admin & Configuration

Workdays & Holidays

- Vault expressions now support the Workday() and NetWorkdays() functions that can factor our weekends and optional holidays
  - Workday() – returns a date that is N days in the future excluding weekends and optionally holiday
    - Workday(start_date, days, (optional) weekend, (optional) holiday_schedule)
  - NetWorkdays() – returns the difference between two dates excluding weekends and optionally holidays
    - NetWorkdays(start_date, end_date, (optional) weekend, (optional), holiday_schedule)
    - Example Expression to return “Days to Approve (Excluding Saturday, Sunday, US holidays)
      - NetWorkdays(created_date__v, approval_date__c, 1, “United States”)



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Workdays & Holidays

- Considerations
  - Customers need to create Holiday Schedule and Holiday records themselves
    - Access a sample VPK containing a Holiday Schedule and Holiday records here: https://github.com/veeva/Vault-Holiday-VPK
    - Included in the package are 63 countries and their associated holidays from 1950 through 2049
  - Customers can access the NetWorkdays optional weekend syntax guide - Indicates the days of the week that will be considered weekend days and are not included in the number of whole working days between start_date and end_date
    - Example: NetWorkdays(created_date__v, approval_date__c, **2**, "United States")
      - Returns "Days to Approve (Excluding Sunday and Monday, US holidays)
  - Learn more about Vault Formula Reference Guide

Weekend number	Weekend days
1 or omitted	Saturday, Sunday
2	**Sunday, Monday**
3	Monday, Tuesday
4	Tuesday, Wednesday
5	Wednesday, Thursday
6	Thursday, Friday
7	Friday, Saturday
11	Sunday only
12	Monday only
13	Tuesday only
14	Wednesday only
15	Thursday only
16	Friday only
17	Saturday only
20	Count the weekends as workdays

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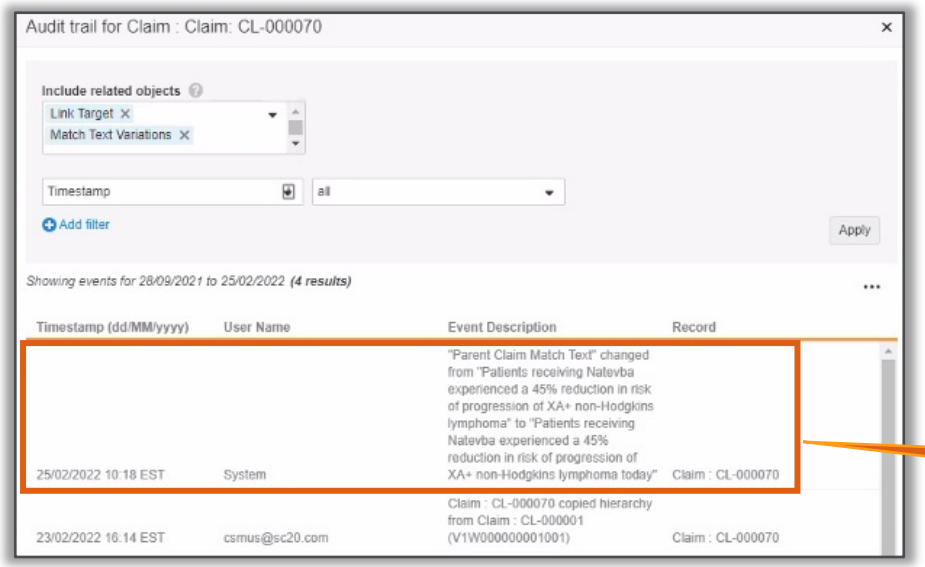
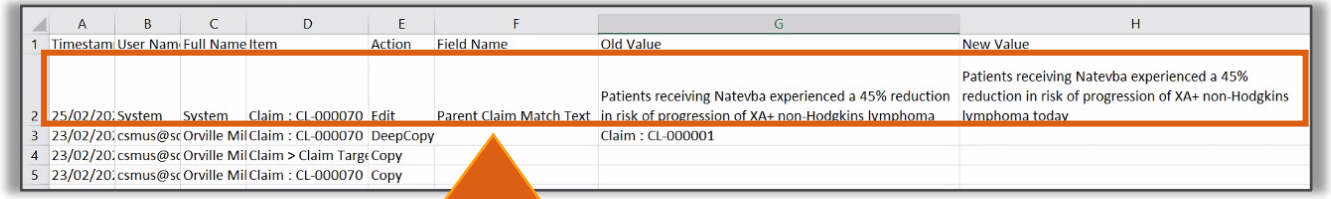
Audit Trail Enhancements to Track Lookup Field Changes in Object Records

- Audit Trail log now includes lookup field changes. Currently tracked changes include:
  - Changes of the source value of a lookup field
  - Changes of the reference object that a lookup field is based on
  - Setting of a lookup field as a result of a lookup field initialization





	A	B	C	D	E	F	G	H
1	Timestam	User Nam	Full Name	Item	Action	Field Name	Old Value	New Value
2	25/02/20	System	System	Claim : CL-000070	Edit	Parent Claim Match Text	Patients receiving Natevba experienced a 45% reduction in risk of progression of XA+ non-Hodgkins lymphoma	Patients receiving Natevba experienced a 45% reduction in risk of progression of XA+ non-Hodgkins lymphoma today
3	23/02/20	csmus@sc	Orville Mil	Claim : CL-000070	DeepCopy		Claim : CL-000001	
4	23/02/20	csmus@sc	Orville Mil	Claim > Claim Targe	Copy			
5	23/02/20	csmus@sc	Orville Mil	Claim : CL-000070	Copy			

Audit Trail report and Export file include the old and new values of the changed lookup field

  - Learn more about Lookup Fields

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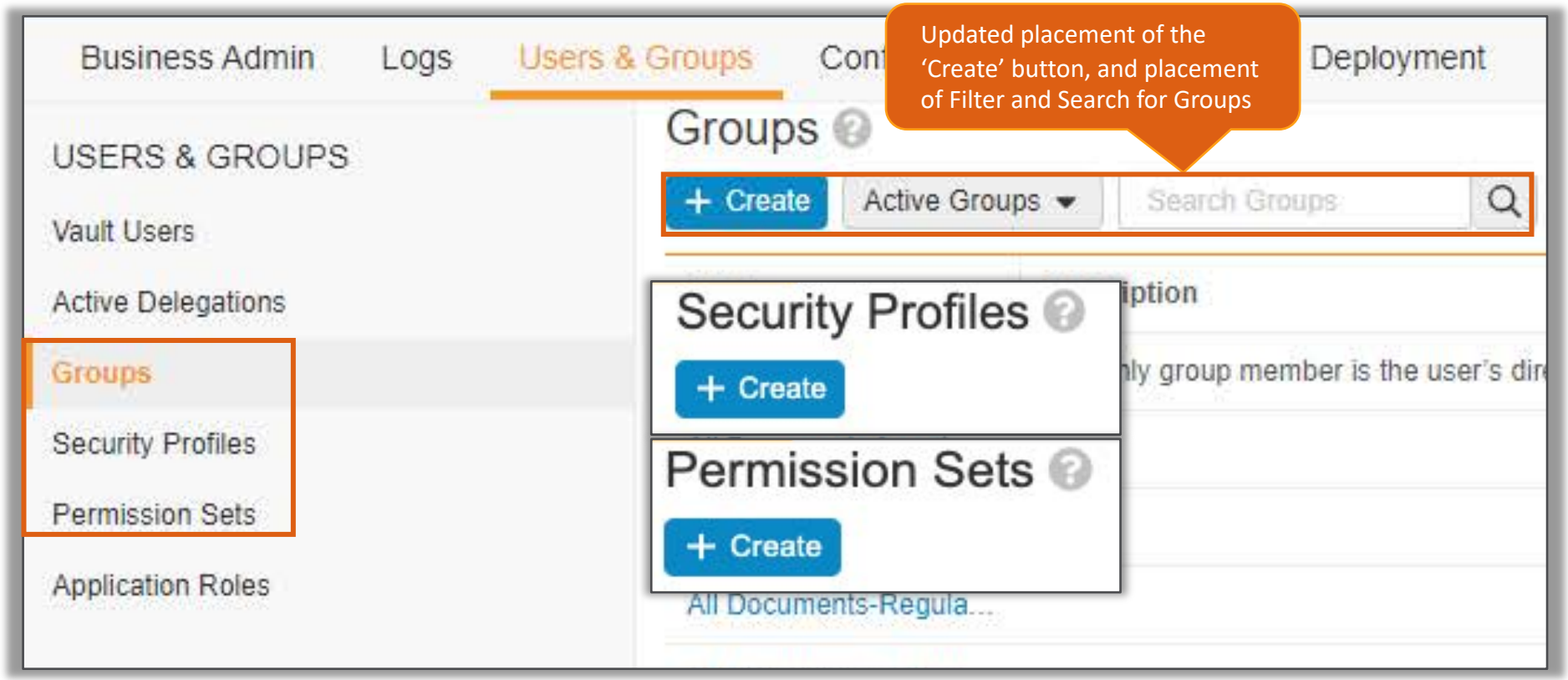
Updated UI Style on Users & Groups Pages

- Security Profiles, Permission Sets, and Groups list views (Admin > Users & Groups) have been updated with the new UI style



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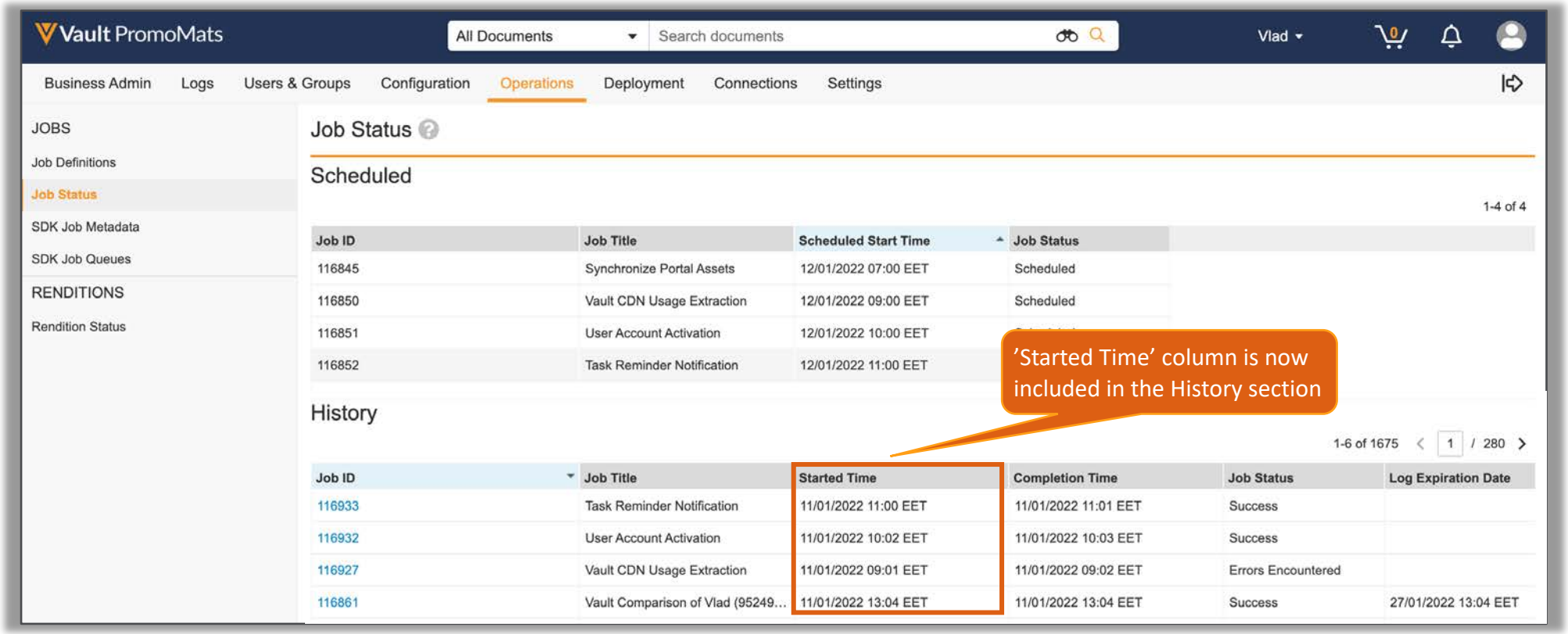
Jobs: Display Start Time for Completed Jobs

- The job start time is now displayed in the job history table on the Job Status page



- Learn more about Managing Jobs & Viewing Jobs Status

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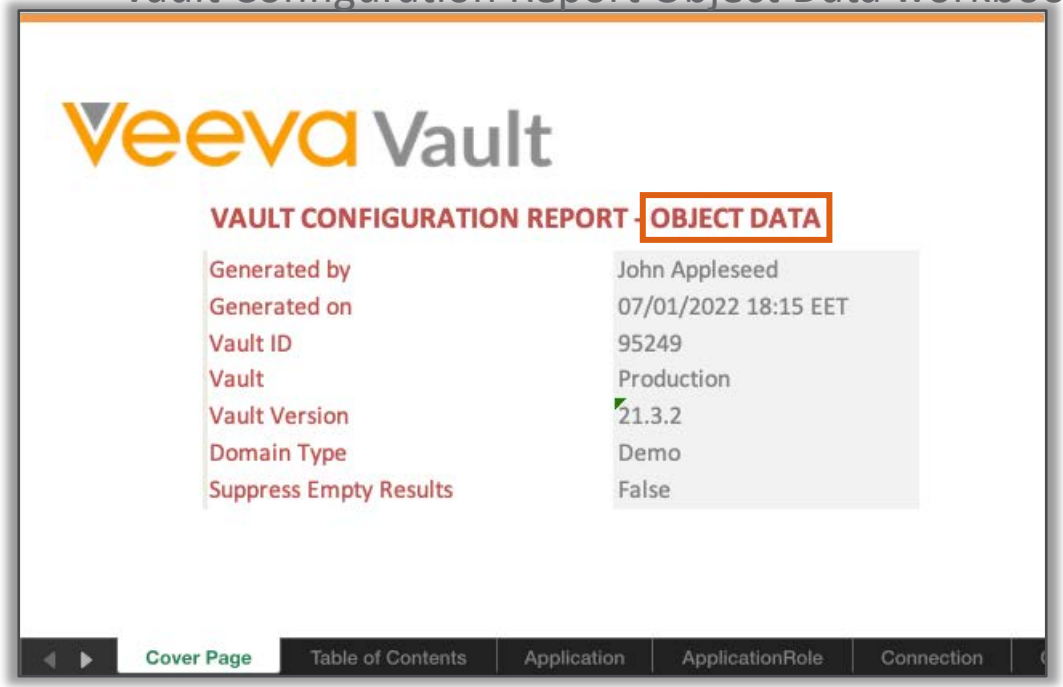
Vault Configuration Report: Cover Page Title for Object Data Workbook

- Vault Configuration Report Object Data workbook now has Object Data on its cover page
  - Vault Configuration Report export consists of two files with similar naming. This feature allows for easier distinction between the primary Configuration Report and Object Data

Vault Configuration Report workbook

Vault Configuration Report Object Data workbook



- Learn more about Configuration Reports

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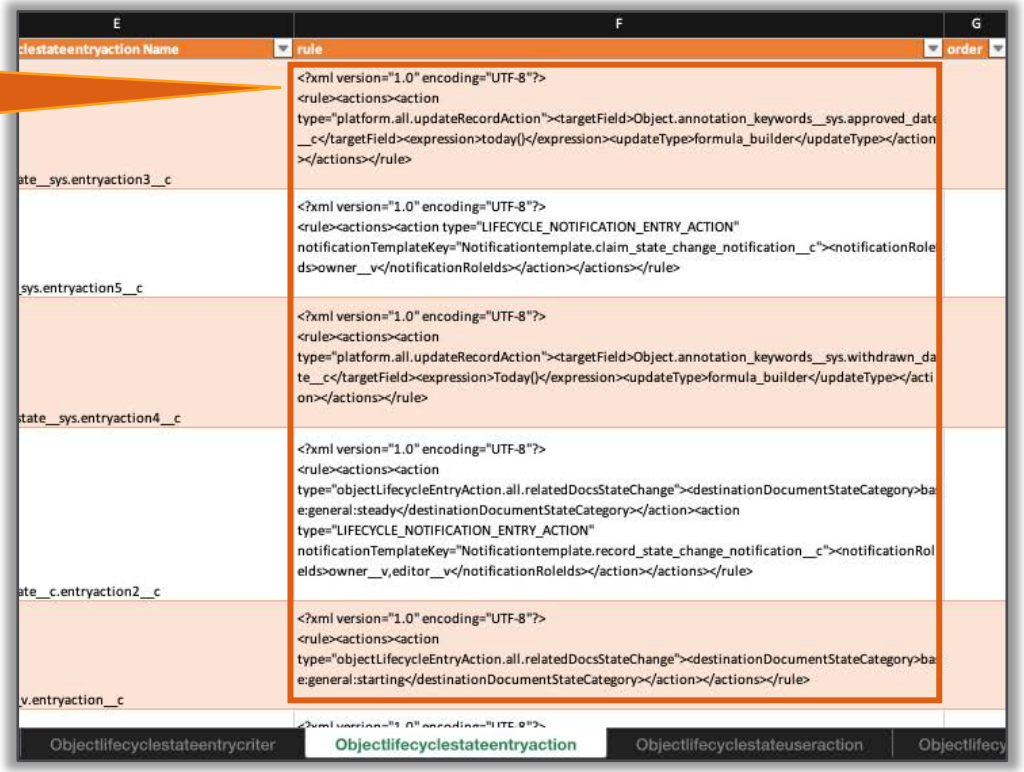
Vault Configuration and Compare Reports: Reporting Full MDL of Object Lifecycle State Entry Action Rules

- Vault Compare and Vault Configuration Reports now report on the formula used in an object lifecycle state entry action by providing the full value of the rule attribute in the Objectlifecyclestateentryaction sub-component

Previously, reports displayed Entry Action rules as text-only representation of the formula. Now the Full formula is represented in XML format

rule
Always relatedDocsStateChange, destinationDocumentStateCategory=base:general:steady;
Always LIFECYCLE_NOTIFICATION_ENTRY_ACTION, notificationTemplateKey=Notificationtemplate.record_state_change_notification__c, notificationRoleIds=owner__v, editor__v
Always relatedDocsStateChange, destinationDocumentStateCategory=base:general:starting
Always relatedDocsStateChange, destinationDocumentStateCategory=base:batch:in_review
Always approveLegalHold
Always liftLegalHold



- Learn more about Lifecycle State Entry Actions

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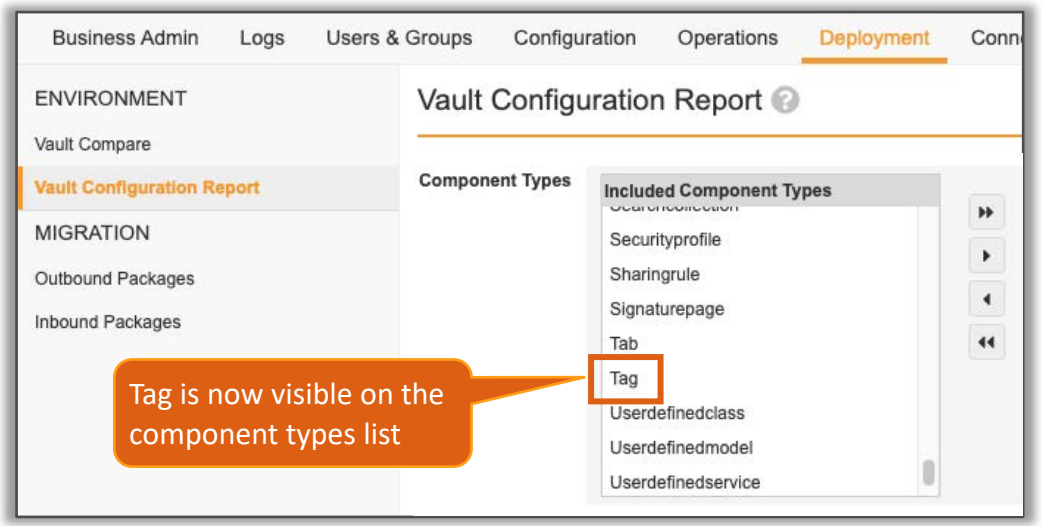
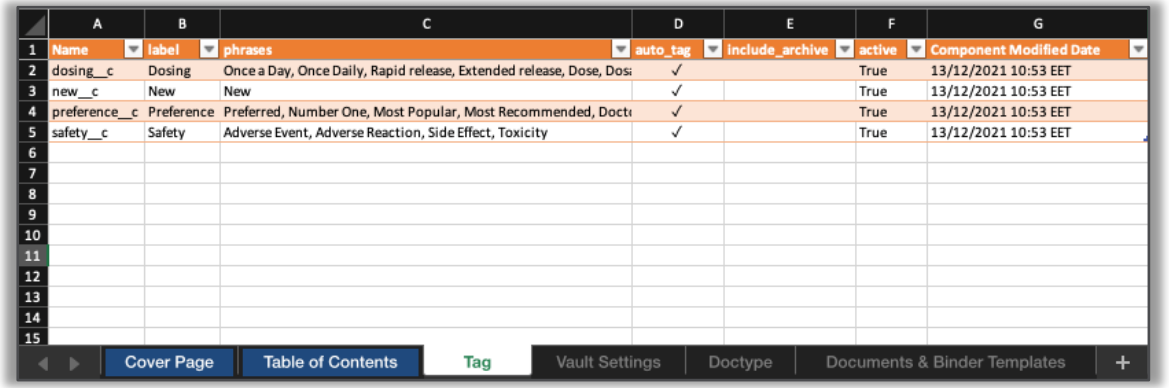
Configuration Management: Migrating Document Tags between Vaults

- Admins can now view Tag components in Vault Configuration and Comparison reports and migrate Document Tags between Vaults using Vault Packages (VPK)





	A	B	C	D	E	F	G
1	Name	label	phrases	auto_tag	include_archive	active	Component Modified Date
2	dosing__c	Dosing	Once a Day, Once Daily, Rapid release, Extended release, Dose, Dosa	✓		True	13/12/2021 10:53 EET
3	new__c	New	New	✓		True	13/12/2021 10:53 EET
4	preference__c	Preference	Preferred, Number One, Most Popular, Most Recommended, Docto	✓		True	13/12/2021 10:53 EET
5	safety__c	Safety	Adverse Event, Adverse Reaction, Side Effect, Toxicity	✓		True	13/12/2021 10:53 EET

Cover Page | Table of Contents | Tag | Vault Settings | Doctype | Documents & Binder Templates

- Considerations
  - This feature is applicable only to Vaults with Outbound and Inbound Packages enabled
  - Learn more about Tags
  - Learn more about Configuration Reports

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Configuration Management: Migrating Document Tags between Vaults

- Configuration
  - Settings > General Settings > Configuration Management > Allow Outbound Packages
  - Settings > General Settings > Configuration Management > Allow Inbound Packages

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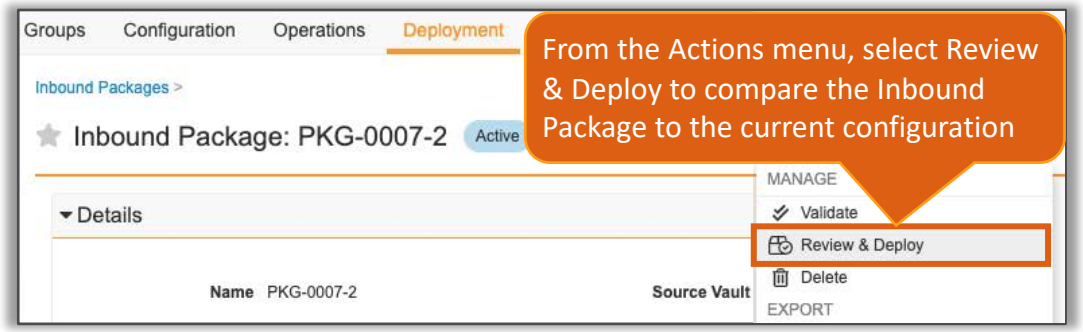
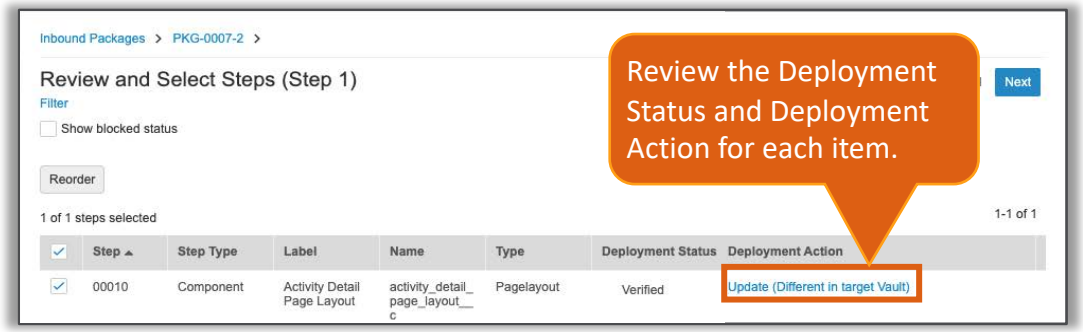
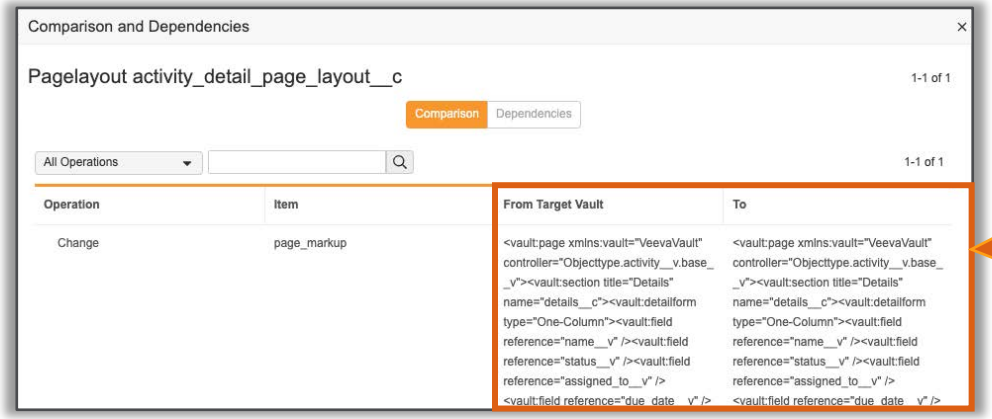
Configuration Management: Comparison of XMLString Component Attributes when Deploying Packages

- Admins can view and compare values of a component's XMLString attributes between the inbound package and the target Vault before deploying the package







- Considerations
  - Auto-on in Vaults with Outbound and Inbound Packages enabled
  - Learn more about Configuration Migration Packages

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Scheduled Data Exports Enhancements

- Increased Precision on Field Values
  - Currency fields in Vault Objects now have two decimal places (instead of one previously)
  - DateTime fields on *Document* and *Document Version* exports now include seconds
- Escaping Characters in CSV Output Updates
  - Commas contained within picklists are escaped by two pairs of double quotes
  - Vault does not add backslash (\) characters to field values with an existing backslash
  - Unique, empty value fields on multi-value objects, displayed as ",," in files extracted from Vault Loader, are empty in Scheduled Data Exports files

Vault Value	Pre-22R1 export	22R1 export
UK, Ireland	UK,,Ireland	""UK, Ireland""
Consumer \ Patient	Consumer \\ Patient	Consumer \ Patient

- Including Inactive Document Fields by Default
  - Vault automatically includes inactive document fields in Scheduled Data Exports when users select the Document entity
- Learn more about Scheduled Data Exports

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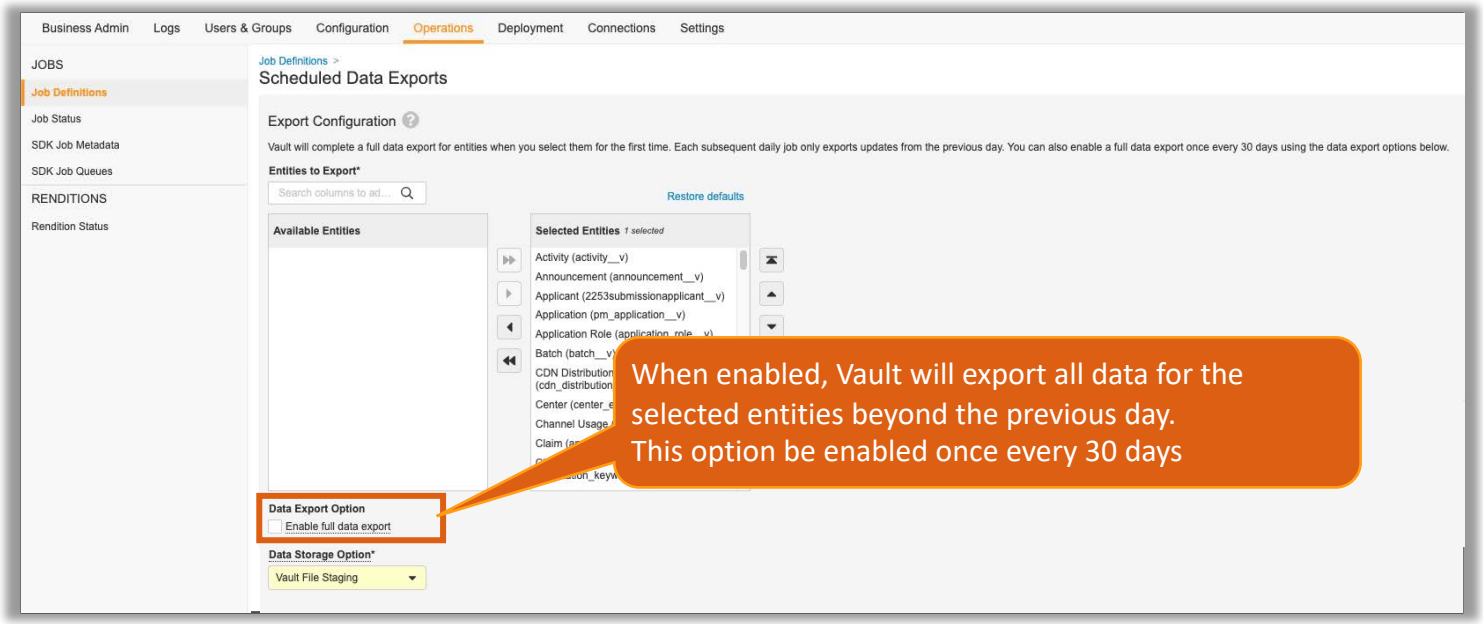
Scheduled Data Exports: Initial Full Data Export

- Admins can export all their Vault object data and document metadata records to complete the initial load of Vault data into respective data lakes and data warehouses
  - Previously, the Scheduled Data Exports job only retrieved updated data from the past 24 hours when the job is run for the first time and on subsequent job runs it only exports updated data since the last successful export.



  - Learn more about Configuring Scheduled Data Exports

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Scheduled Data Exports: Uploading CSV Files to S3 with Bucket Owner Full Control ACL

- Customers using a self-managed AWS S3 bucket as a storage option for Scheduled Data Exports can be the S3 object owner for every export file uploaded to the bucket

- Considerations
  - Additional AWS S3 configuration may be required
  - Learn more about Scheduled Data Exports
  - Learn more about S3 Object Ownership

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Significant Figures in Expressions

- This feature modifies the Round function to accept an optional parameter that can either be “significant” or “significant-astm”
  - This enables users to round their numbers down to the appropriate number of significant figures based on two common methodologies
    - “Significant” Example: Round(0.445, 2, "significant") returns “0.45”
    - “Significant-astm Example: Round(0.445, 2, “significant-astm”) returns “0.44”
  - Learn more about Vault Formula Reference Guide

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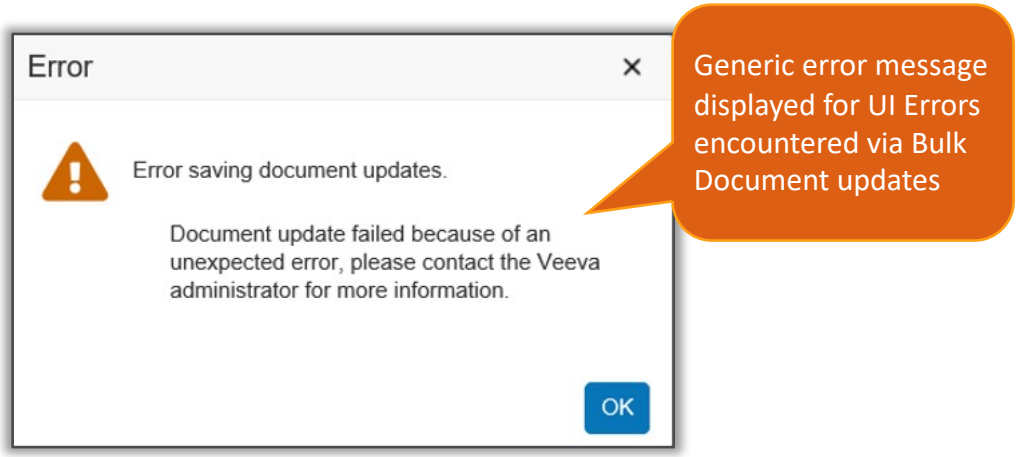
Enhanced Bulk Document Update: Validation Behavior Changes

- When using the Bulk Actions functionality to make changes on documents, Vault will now:
  - Display a generic error message for any UI errors that do not have a pre-defined error message
  - Display an error message if a user attempts to update a read-only field on a document via bulk action using the API



- Considerations
  - Only available for Bulk Actions on Documents
  - Learn more about using Bulk Document Actions

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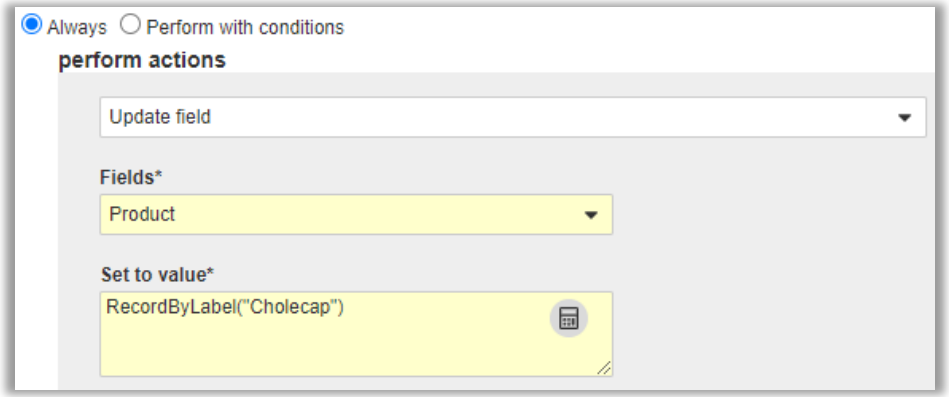
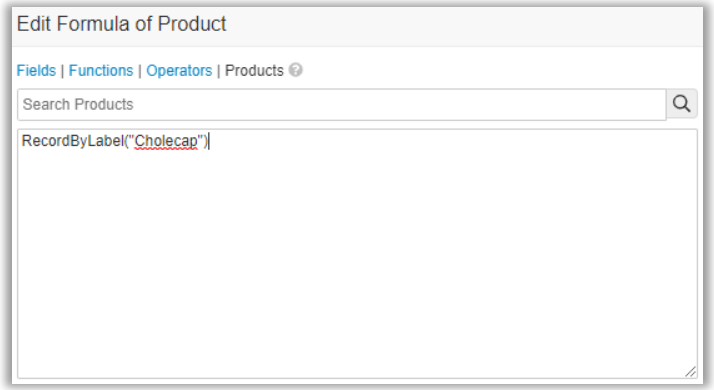
Record By Label () Function in Expressions

- This feature allows users to return object references based on object record labels in expressions
  - The RecordByLabel() function accepts object labels and returns object references which can then be used to populate fields
    - RecordByLabel("Cholecap") returns the object reference for the Cholecap product
- Considerations
  - The RecordByLabel() function is only available in workflow and lifecycle actions
  - Learn more about Vault Formula Reference Guide
- Configuration
  - Admin > Configuration > Document / Object Lifecycle > [Lifecycle] > [State] > Entry Action > Create Entry Action





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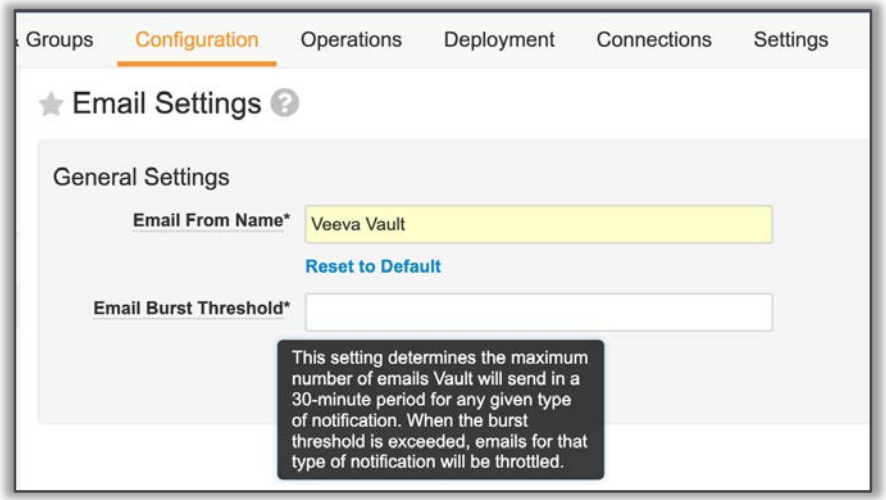
Notifications: Email Burst Threshold

- Admins can set a burst threshold for the number of emails Vault sends for the same notification template in a 30-minute period
- Once the burst threshold is reached, Vault throttles the sending of additional email notifications for that template
- Considerations
  - The maximum value is 1,000,000
  - The threshold is calculated by notification template because if there is one inadvertent large notification, other notifications issued during that time are still sent without interruption
  - If the burst limit has been met, all emails that exceed the threshold will be distributed 72 at a time, every 3 minutes for the next 30 minutes
  - Learn more about Email & Messages Administration
- Configuration
  - Admin > Configuration > Email Settings



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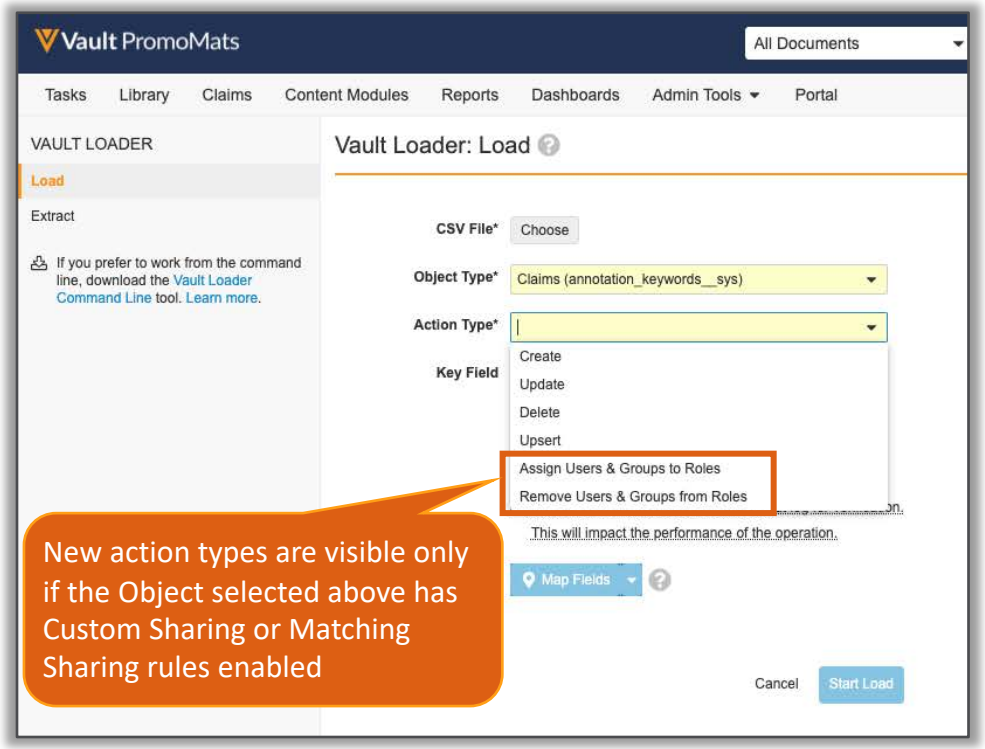
Vault Loader

Vault Loader: Updating User & Group Role Assignments on Object Records

- Vault Loader now provides the ability to assign and remove users and groups from object record roles for objects that have custom and matching sharing rules enabled
  - Previously, this action had to be done via API or manually directly in Vault

- Considerations
  - Learn more about Updating Object Record Roles with Vault Loader



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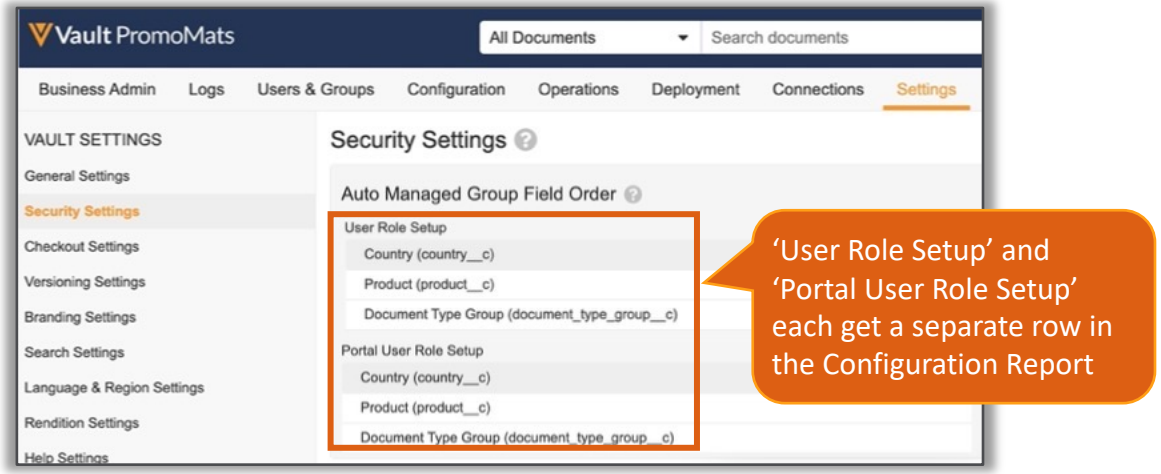
Vault Configuration and Compare Report: Details for Auto Managed Group Field Order Security Settings

- Security settings for Auto Managed Group Field Order in Vault Compare and Vault Configuration Reports now display each object and its fields in individual rows



Section	Sub-Section	Feature	Child Feature	Setting	Value
Security Settings	Administrator Access			Business Admins and System Admins have automatic access to all documents	False
Security Settings	Administrator Access			Business Admin and System Admin access is governed by document sharing settings	True
Security Settings	Role Assignment			Allow users to assign all available roles	True
Security Settings	Send As Link Settings			Allow users with Edit Sharing Settings permission to add users as Viewers when sending link	True
Security Settings	Send As Link Settings			Allow users to send link to non-Vault users	True
Security Settings	Send As Link Settings			Allow users to give non-Vault users ability to download viewable rendition	True
Security Settings	User Role Constraints			Enable user role constraints	False
Security Settings	Manager Groups	Enable Manager Groups			False
Security Settings	Dynamic Access Control For Documents			Number of lifecycle roles enabled	42
Security Settings	Auto Managed Group Field Order			User Role Setup (user_role_setup__v)	Country (country__c), Product (product__c), Document Type Group (document_type_group__c)
Security Settings	Auto Managed Group Field Order			Portal User Role Setup (portal_user_role_setup__c)	Country (country__c), Product (product__c), Document Type Group (document_type_group__c)
Checkout Settings	Office Application Settings			Directory (tenant) Id	
Checkout Settings	Office Application Settings			Application (client) Id	
Checkout Settings	Office Application Settings			Auto Invite External Users	False
Checkout Settings	Office Application Settings			Client Secret	
Checkout Settings	Office User Settings			Collaboration User	
Checkout Settings	Office User Settings			Collaboration Drive	
Checkout Settings	Integration Status				Not Authorized
Versioning Settings	Versioning Settings	Enable Upload New Version			True

Cover Page | Table of Contents | Vault Settings | Documents & Binder Templates | Layoutrule | Matchingrule | Permissionset | Rolepermissionset | Securityprofile | Sharingrule | Sharingrule.Sharingrole

- Learn more about Auto Managed Groups

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Vault Loader: Return Updated Roles in Success Log

- When updating document roles using Vault Loader, the success log now contains the updated role IDs
  - Learn more about Updating Object Record Roles with Vault Loader

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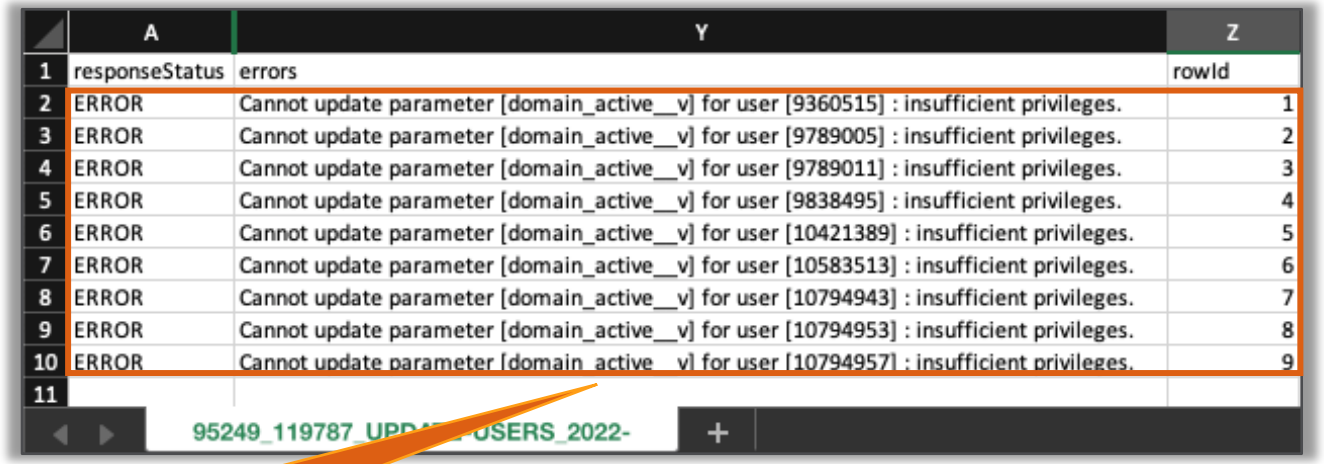
Vault Loader: Log Skipped Lines in Failure Log

- Vault Loader failure logs now include any input CSV lines that were skipped due to errors.



	A	Y	Z
1	responseStatus	errors	rowId
2	ERROR	Cannot update parameter [domain_active__v] for user [9360515] : insufficient privileges.	1
3	ERROR	Cannot update parameter [domain_active__v] for user [9789005] : insufficient privileges.	2
4	ERROR	Cannot update parameter [domain_active__v] for user [9789011] : insufficient privileges.	3
5	ERROR	Cannot update parameter [domain_active__v] for user [9838495] : insufficient privileges.	4
6	ERROR	Cannot update parameter [domain_active__v] for user [10421389] : insufficient privileges.	5
7	ERROR	Cannot update parameter [domain_active__v] for user [10583513] : insufficient privileges.	6
8	ERROR	Cannot update parameter [domain_active__v] for user [10794943] : insufficient privileges.	7
9	ERROR	Cannot update parameter [domain_active__v] for user [10794953] : insufficient privileges.	8
10	ERROR	Cannot update parameter [domain_active__v] for user [10794957] : insufficient privileges.	9
11			

95249_119787_UPD -USERS_2022-

CSV lines that resulted in errors are included in failure logs

- Learn more about Updating Object Record Roles with Vault Loader

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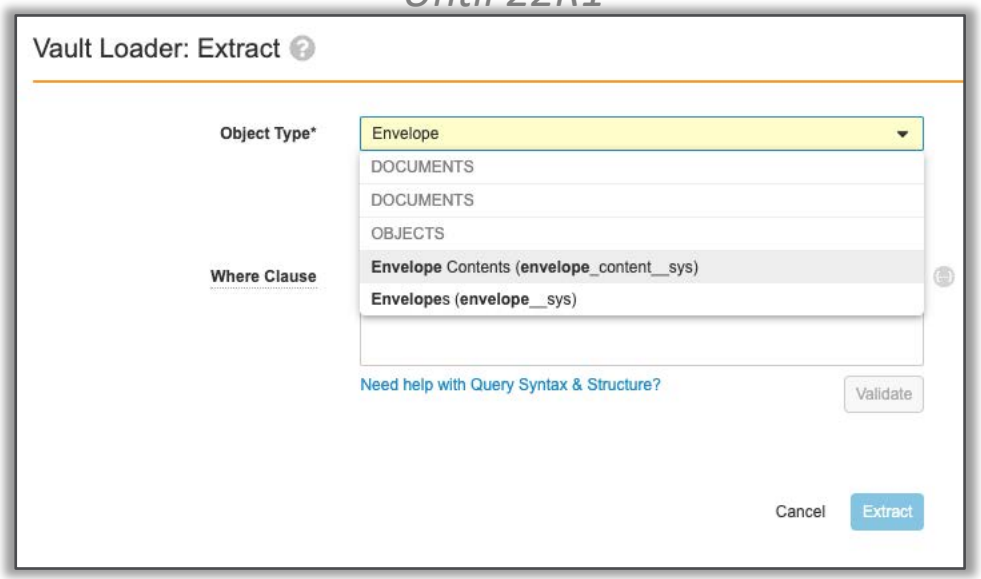
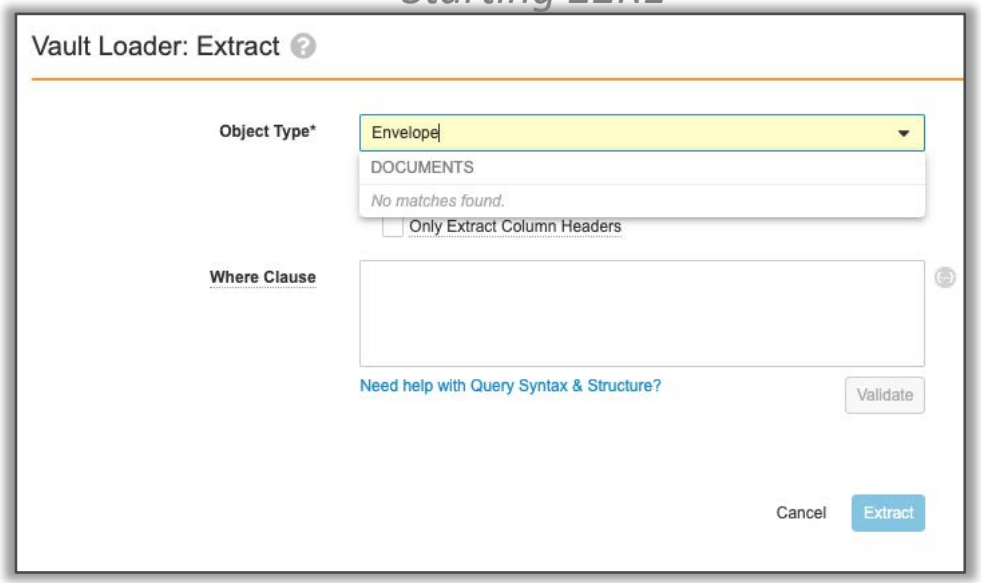
Vault Loader: Disabling Workflow System Objects from Load or Extract Requests

- Envelope_sys and Envelope_Content_sys system objects are no longer available for load or extract using Vault Loader.

Until 22R1



Starting 22R1



- Learn more about Creating, Editing and Deleting Object Records using Vault Loader
- Learn more about Envelope and Envelope Content Object Record Access

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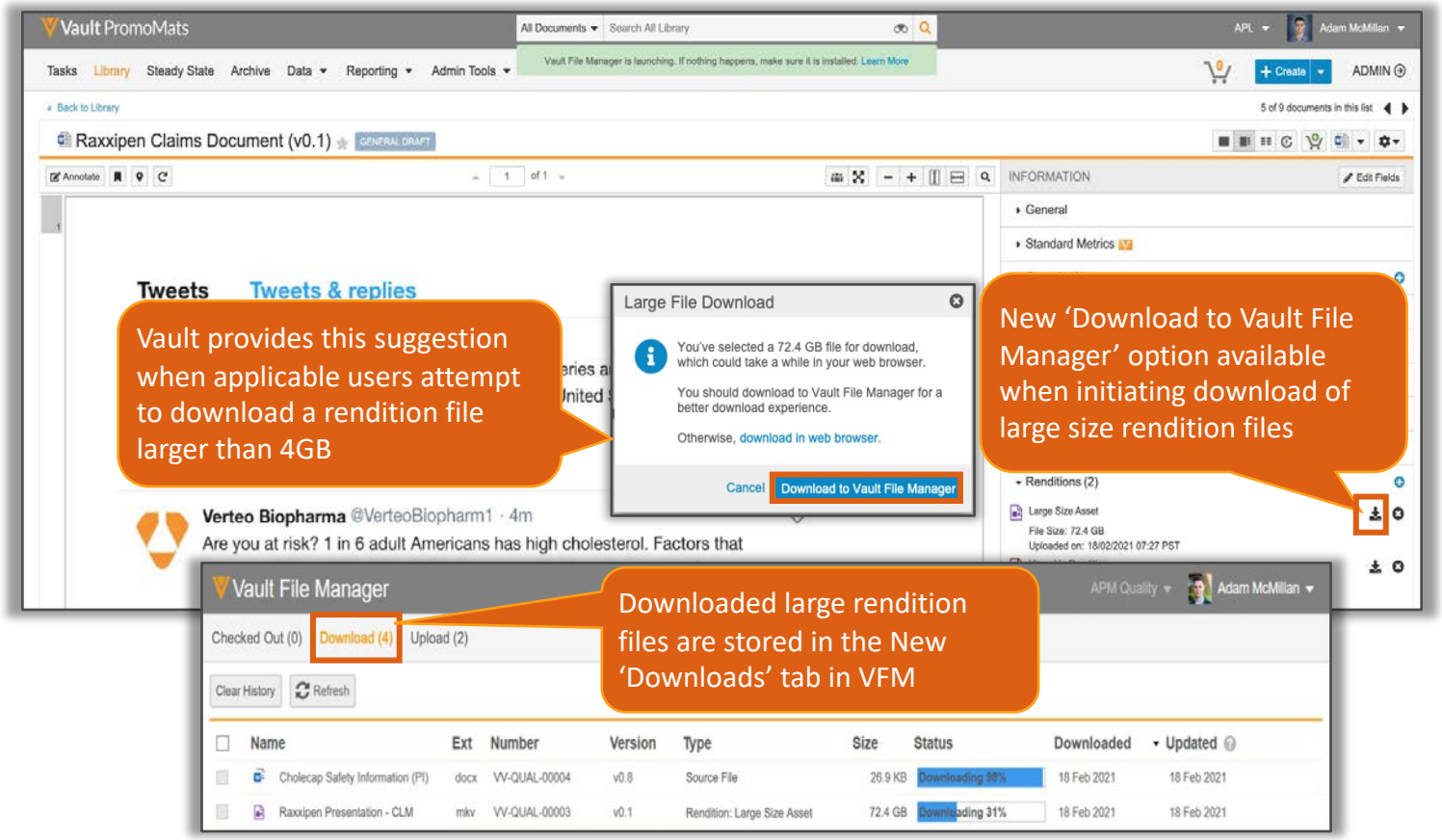
Vault File Manager

Download Rendition Files to Vault File Manager (VFM)

- Users attempting to download Large Size Asset files bigger than 4GB from menu will have the option to download to Vault File Manager
  - VFM provides additional error messages when a file fails to download
  - VFM downloaded files now includes Vault Overlays



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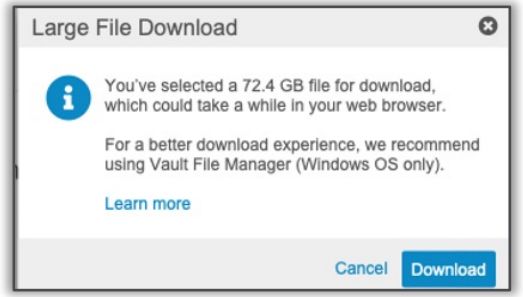
Download Rendition Files to Vault File Manager (VFM)

- Considerations
  - Auto-on feature if user has VFM downloaded to Windows machine and the appropriate permissions
  - Users need the following permissions:
    - Application > Document > Vault File Manager
    - Application > File Staging Access
    - Application > Document > Download Rendition
  - Users downloading large size assets on a non-Windows OS machine will see a modified message dialog



  - A maximum of 8 files can be downloaded at once to VFM
  - Learn more about Vault File Manager

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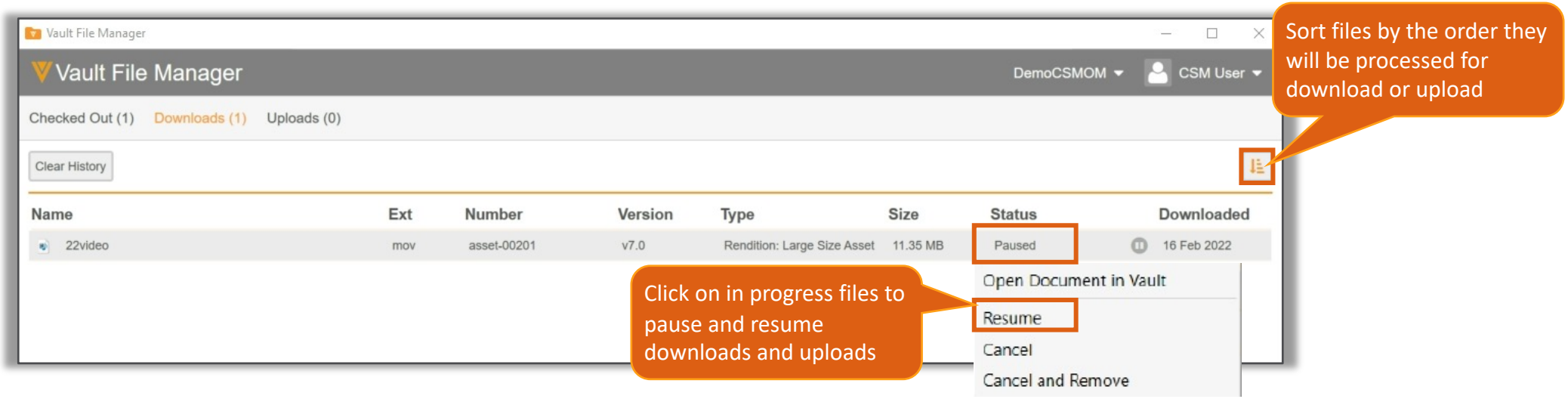
Pause & Resume Uploads & Downloads with Vault File Manager

- Vault File Manager allows users to pause and resume in progress uploads and downloads
  - This feature enables users to better manage multiple large files that can take long amounts of time to upload or download
- Users can also sort files on the Uploading and Downloading tabs by the order in which they will be uploaded and downloaded
  - This feature makes it easier to determine the order in which files will be processed for upload or download



  - Learn more about Vault File Manager for Windows

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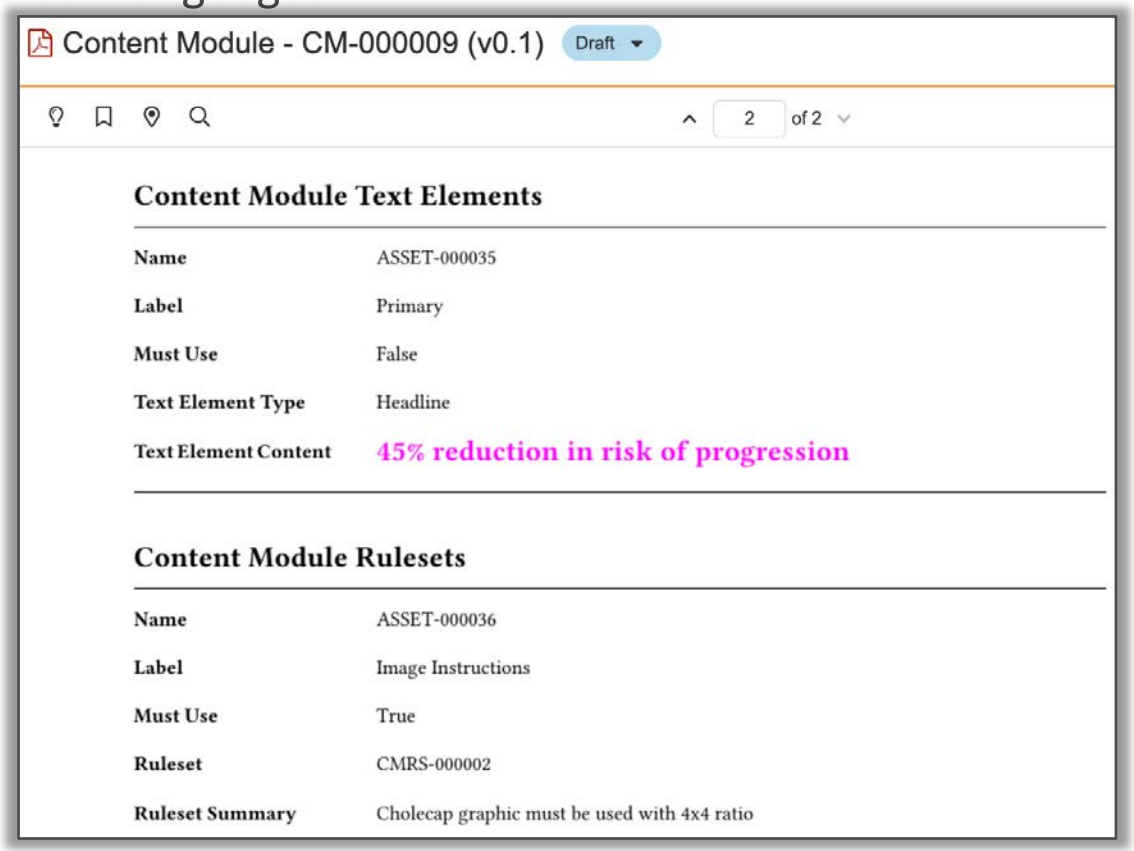
PromoMats

Modular Content Approval Document Enhancements

- Vault's Modular Content Approval Document now includes the following enhancements and functionalities:
  - Support for Chinese, Japanese, and Korean languages
  - Increase rich text formatting options
  - Support for text background colors



  - Learn more about Creating & Approving Content Modules

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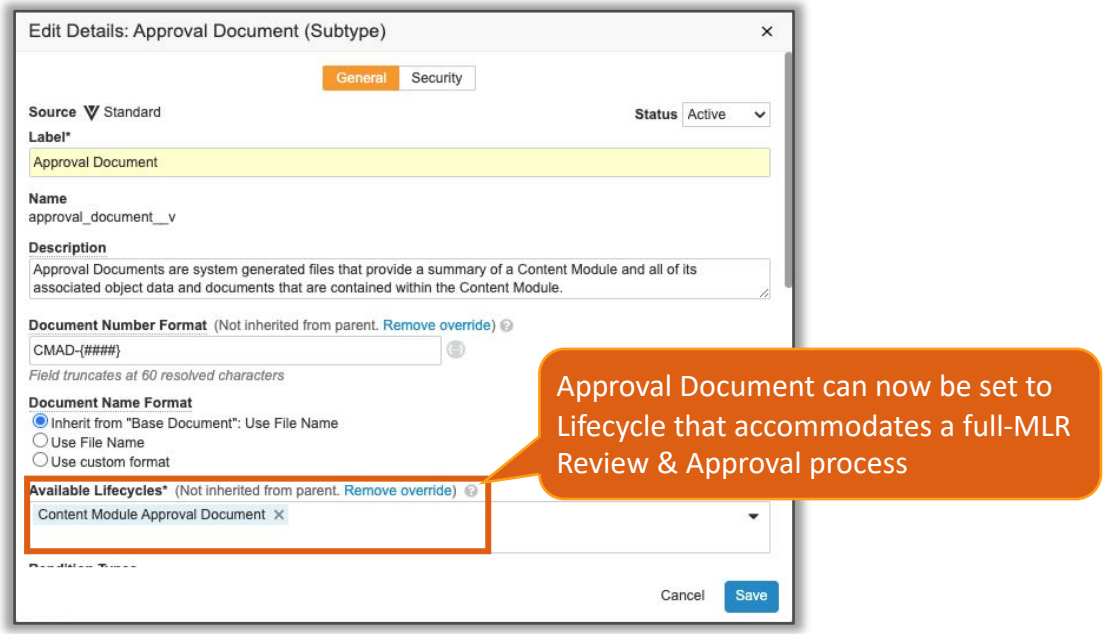
Modular Content Approval Document Additional Lifecycle Support

- Admins can associate the Module Content Approval Document with any lifecycle
  - Previously the Approval Document was limited to the Content Module Approval Document Lifecycle



- Considerations
  - In case the Approval Document subtype is associated with multiple lifecycles, Vault associates the first lifecycle listed alphabetically as that document's lifecycle when performing the Generate Approval Document action.
    - Best practice is to associate each Document Type to a single Lifecycle
  - Learn more about Reviewing & Approving Content Modules

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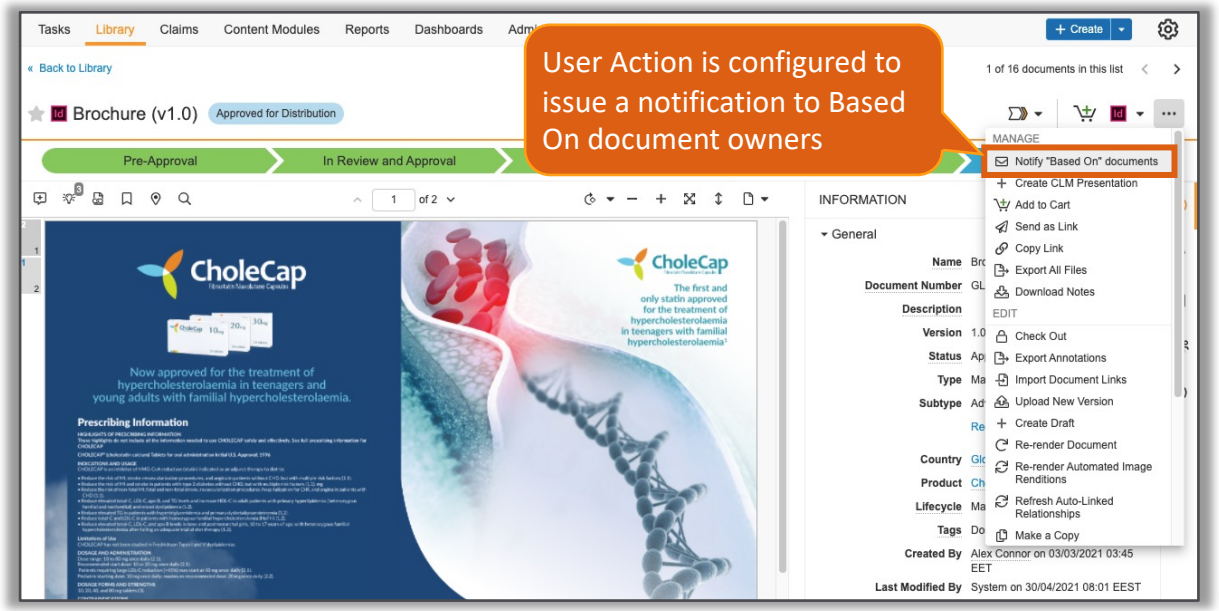
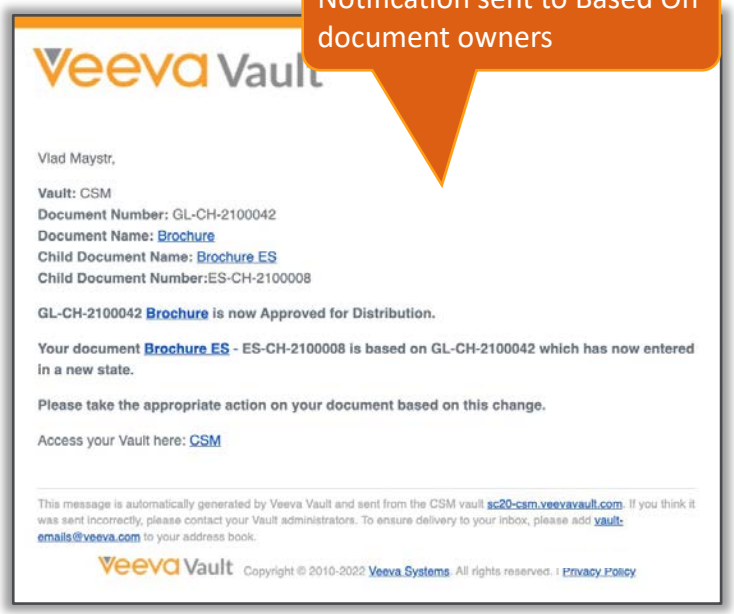
Document Notifications: Support for "Based On" Relationship

- Vault can now send notifications to the owners of documents if the Parent Document in the "Based On" relationship experiences the following:
  - Document Entry Action
  - User Action





  - Learn more about Parent Document Notifications

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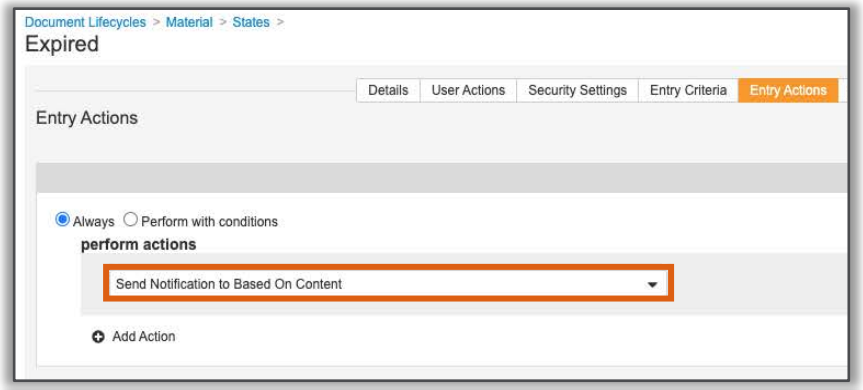
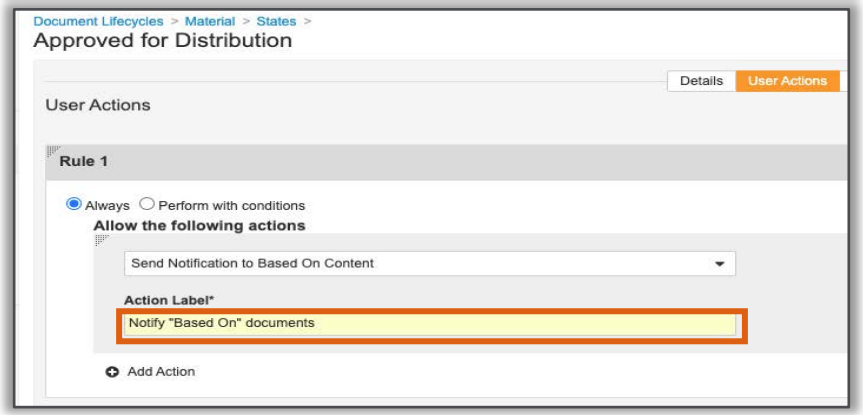
Document Notifications: Support for "Based On" Relationship

- Configuration
  - To add as state Entry Action: Configuration > Document Lifecycles > [Document Lifecycle] > States > [State] > Entry Actions > Add *Send Notification to Based On Documents* action
  - To add as User Action: Configuration > Document Lifecycles > [Document Lifecycle] > States > [State] > User Actions > Add *Send Notification to Based On Documents* action





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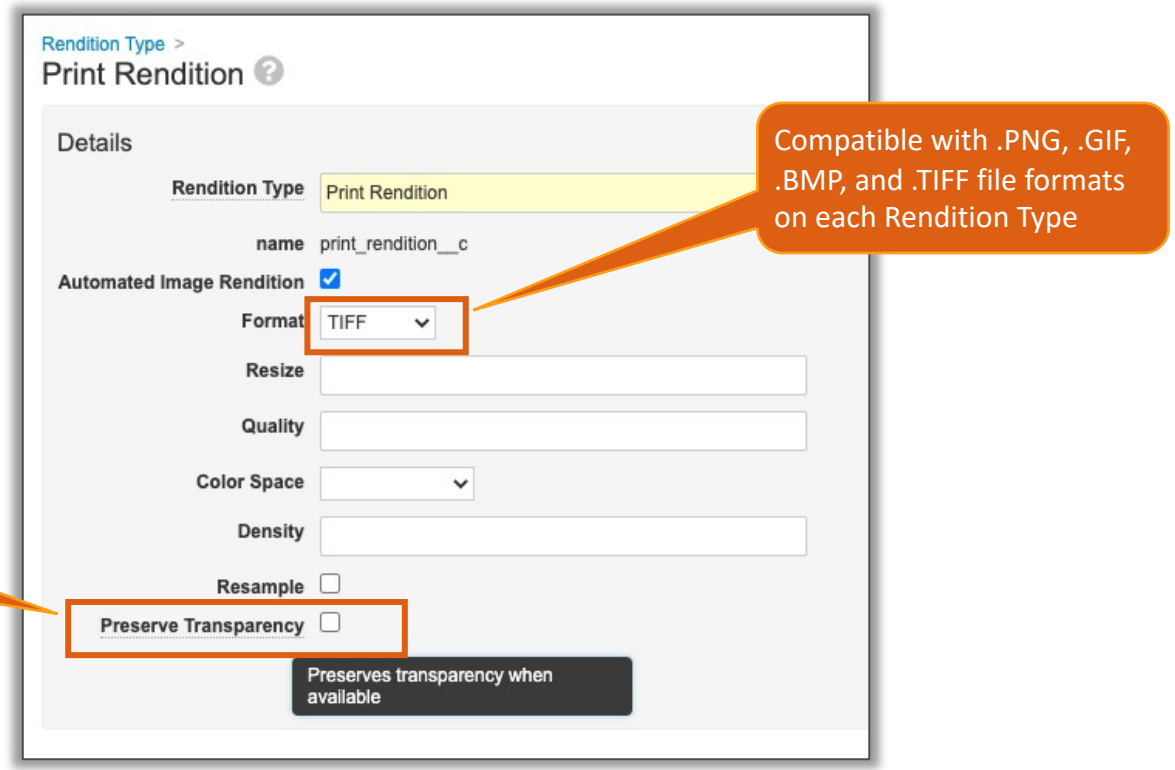
Transparency Support in Automated Image Renditions

- Now any file that contains a transparent background can be maintained in automated image renditions
- Learn more about Automated Image Renditions
- Configuration
  - Admin > Configuration > Rendition Types and click Create/Edit



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Automated-Image Rendition: Include Document Name

- Automated-Image Rendition naming conventions can now be configured to concatenate the document name with the generated rendition type
  - If configured, the downloaded automated image rendition file will have a naming convention of [Document Name] - [Rendition Type].[Format Extension], which will be visible on downloads
    - For example, [1 in 4 discontinue chemotherapy] – [blackandwhiterendition].[jpeg]

- Considerations
  - New flag is only available in Vaults where Automated-Image Renditions are enabled
  - Document Name refers to the *Name* field (name__v) on the source document
  - Learn more about Automated Image Renditions

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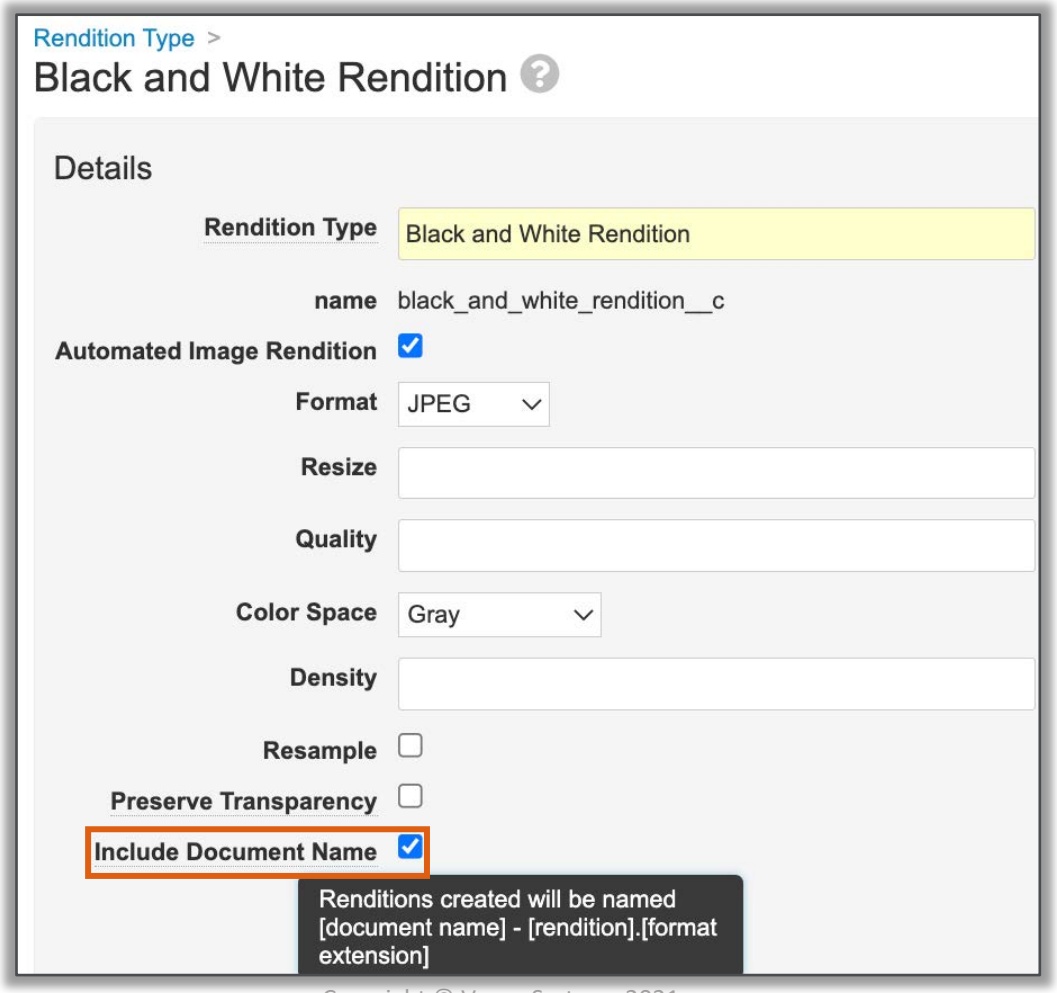
Automated-Image Rendition: Include Source Document Name

- Configuration
  - Admin > Configuration > Rendition Types > {Automated Image Rendition} > Enable '*Include Document Name*'



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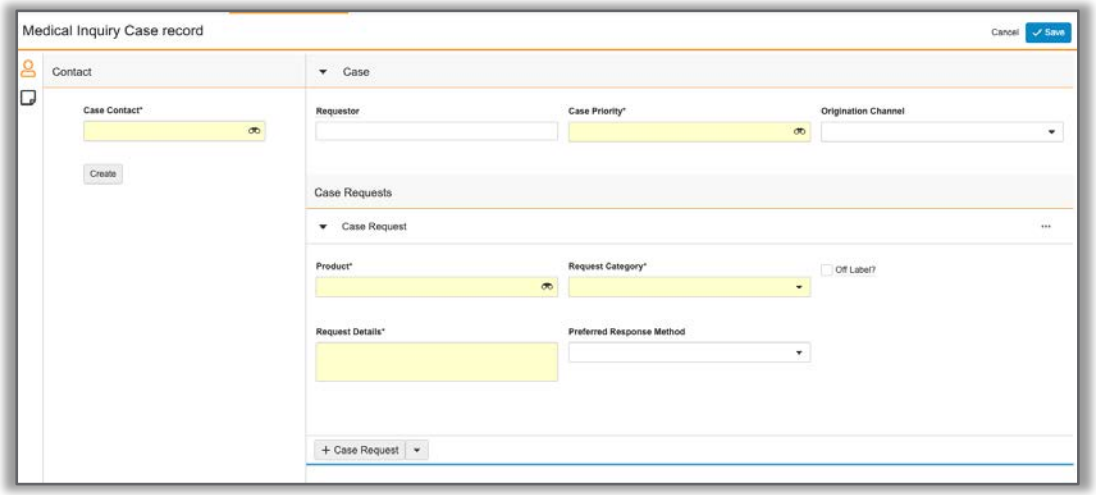
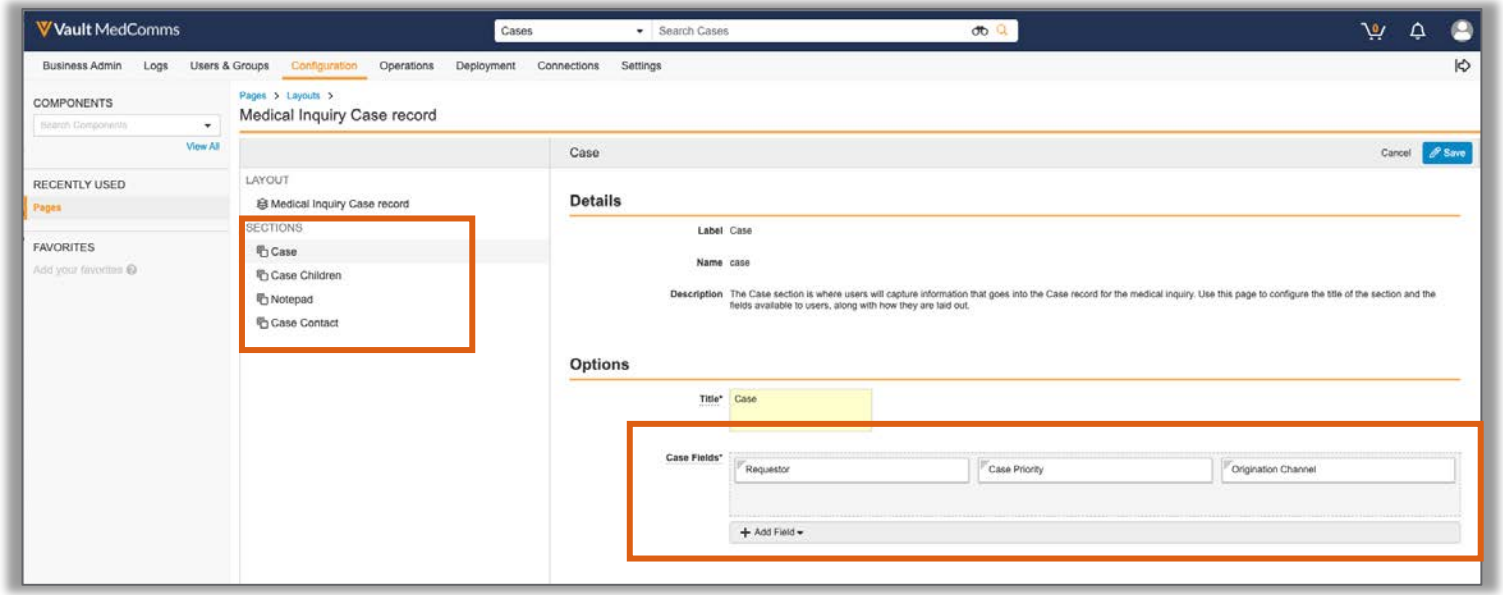
MedComms

Medical Inquiry UI: Admin Page

- Admins can modify the layout of the Medical Inquiry user interface using an enhanced configuration Pages UI
  - The new Admin UI allows for easy updates to objects, fields, and layout of the individual medical inquiry case record creation page sections
  - Access the new Pages Layouts via Admin > Configuration > Pages > Medical Inquiry > [Layouts] > Medical Inquiry Case record
  - Learn more about Configuring Medical Inquiry





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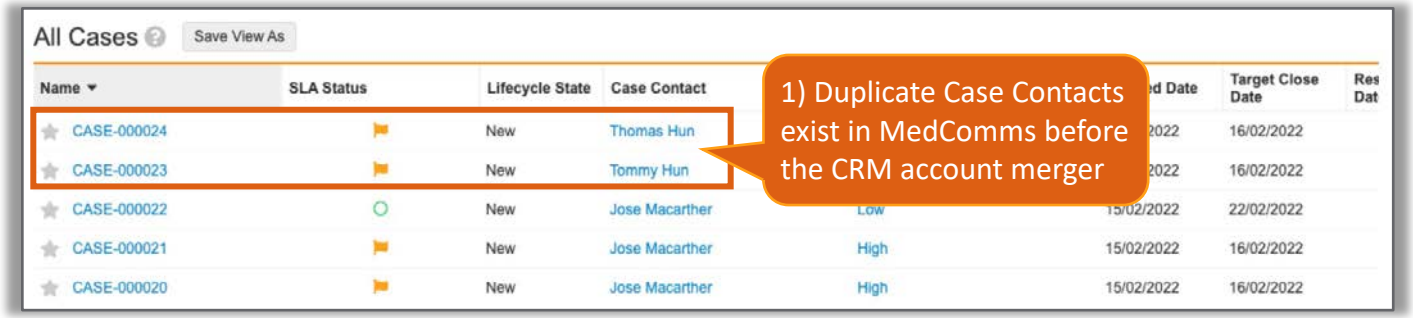
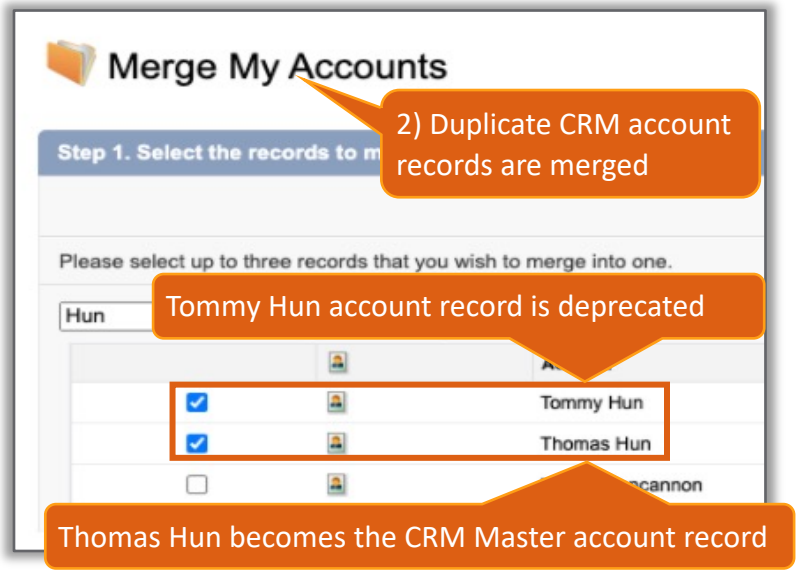
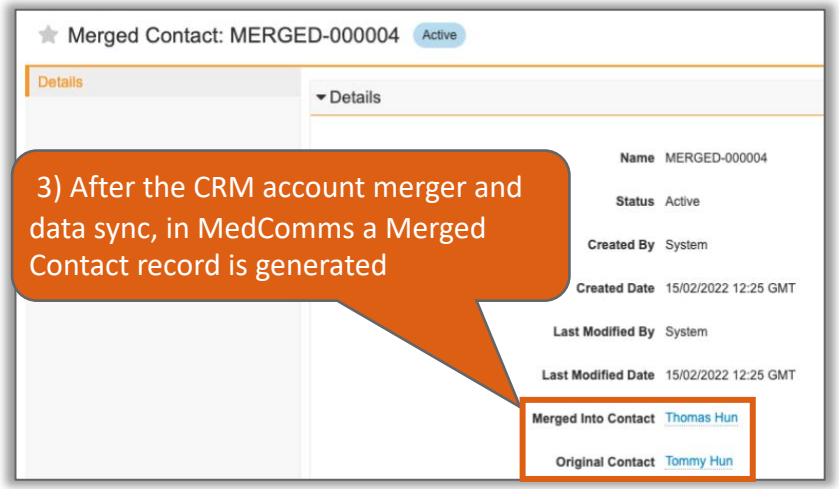
CRM Data Sharing: Support Merged CRM Accounts

- This feature adds support to the standard integration between MedComms and Veeva CRM allowing duplicate CRM contacts to be merged in MedComms







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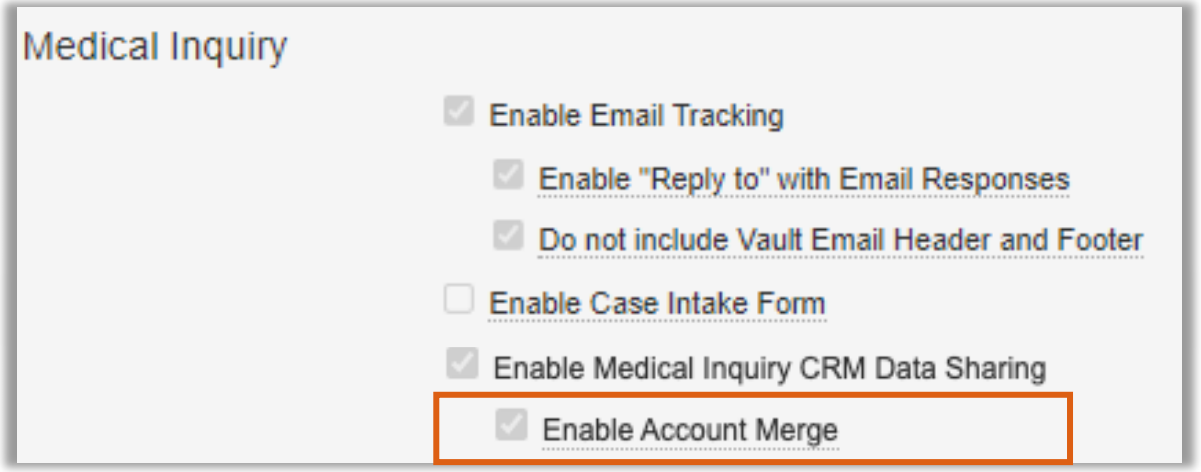
CRM Data Sharing: Support Merged CRM Accounts

- Considerations
  - If there is no Lifecycle on the Person Record, the contact that was merged is set to Inactive
  - If there is a Lifecycle on the Person Record that no longer exists in CRM, they not made inactive in Vault. A Report can be used to reconcile these Case Contacts and make them inactive in Bulk
  - Learn more about Configuring Medical Inquiry CRM Data Sharing

- Configuration
  - You must contact Veeva Support to enable CRM Data Sharing
  - Admin > Settings > Application Settings > Medical Inquiry > 'Enable Account Merge'



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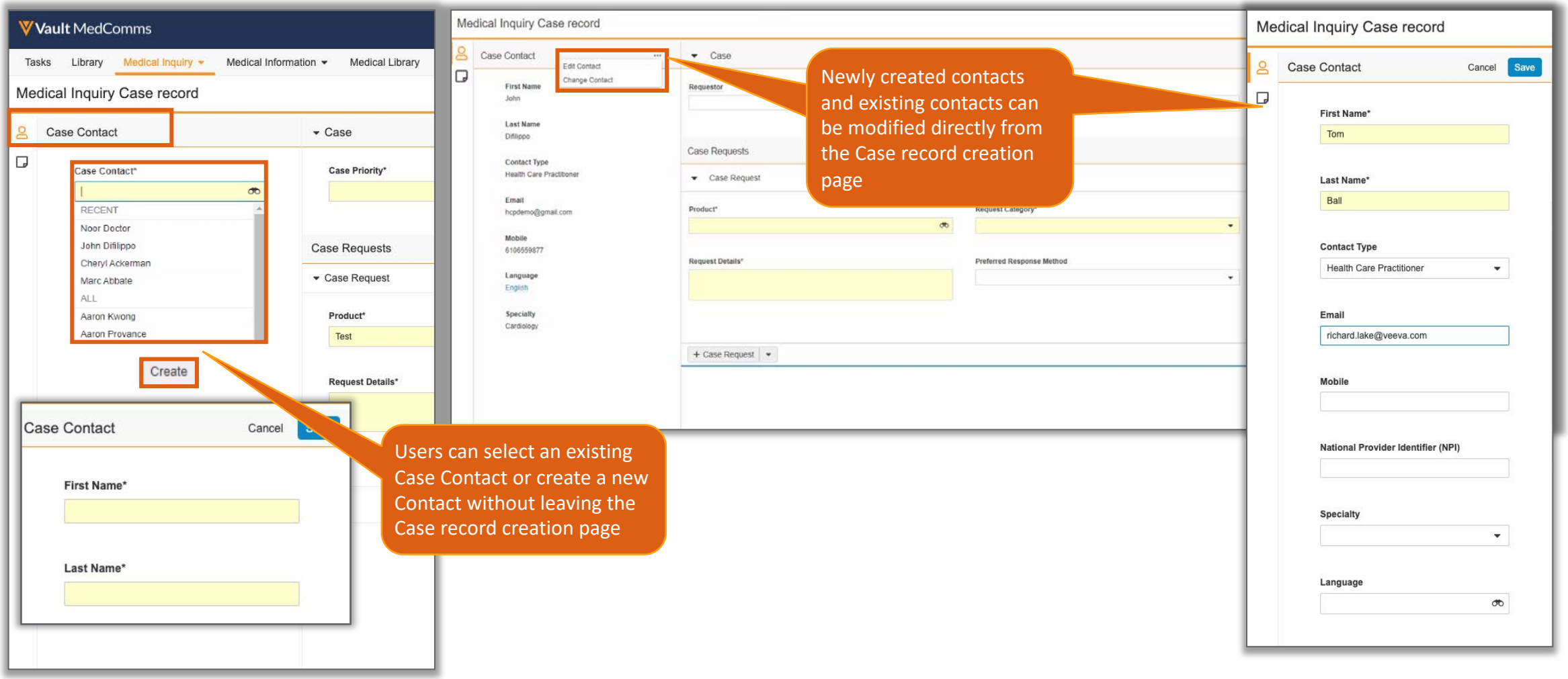
Medical Inquiry UI: Case Contact Section

- A new section has been added to the Medical Inquiry user interface containing information on the Case Contact



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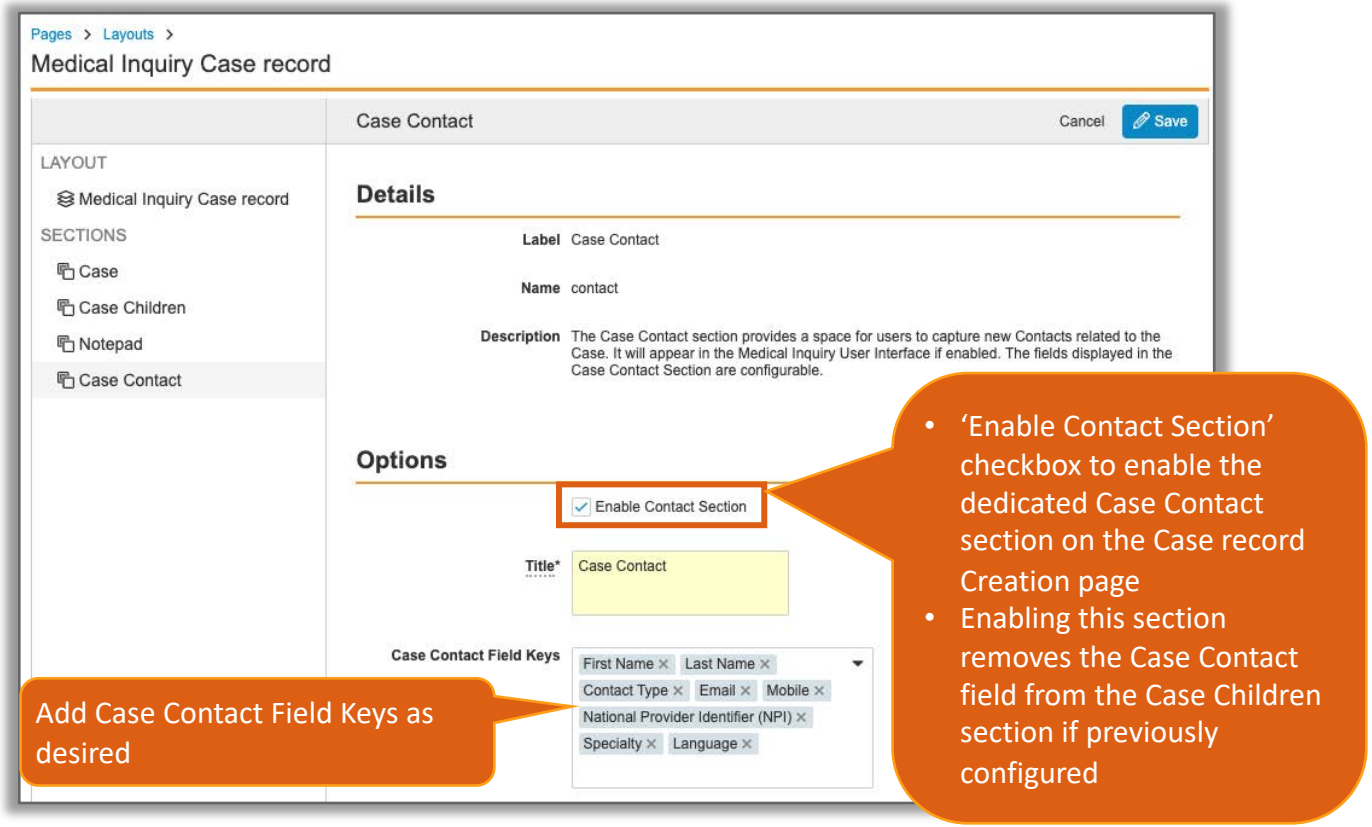
Medical Inquiry UI: Case Contact Section

- Configuration
  - Admin > Configuration > Pages > Medical Inquiry > Medical Inquiry Case record Layout > Case Contact > Edit > 'Enable Contact Section'



  - Learn more about Medical Inquiry

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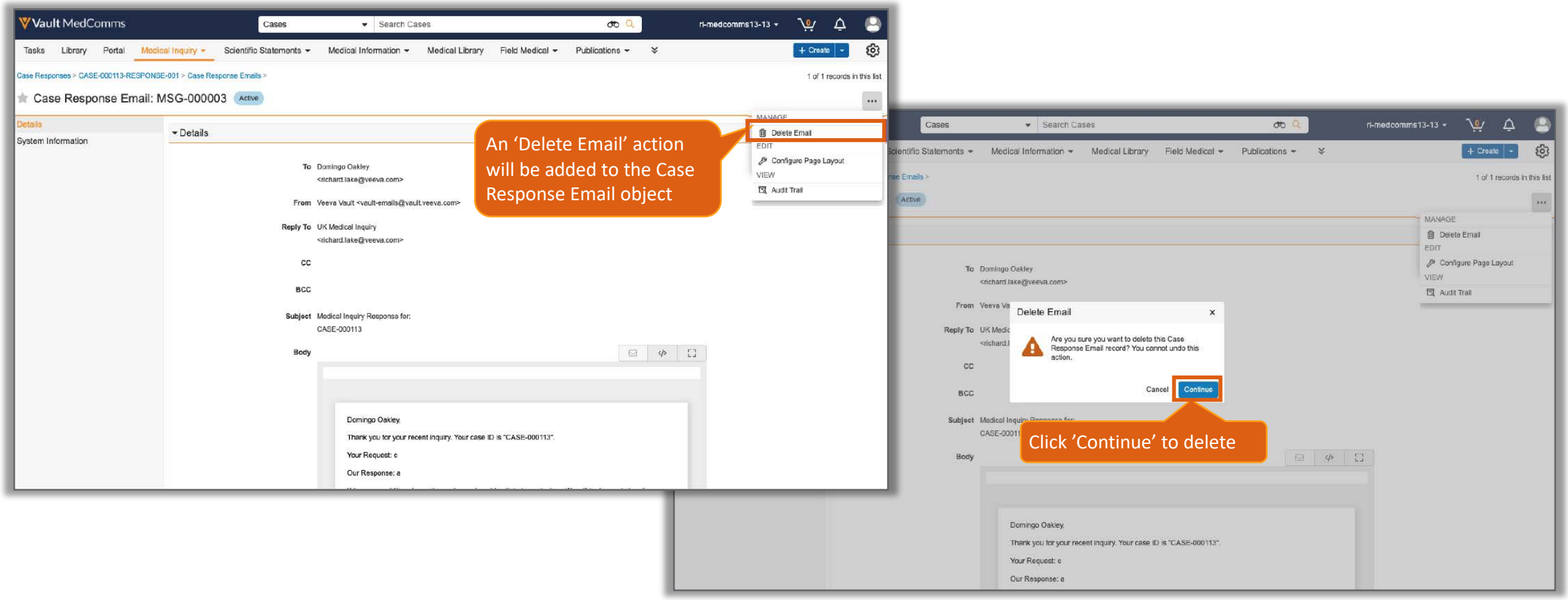
Allow Case Response Emails to be Deleted

- Users with the required permissions can permanently delete Case Response Emails from the system



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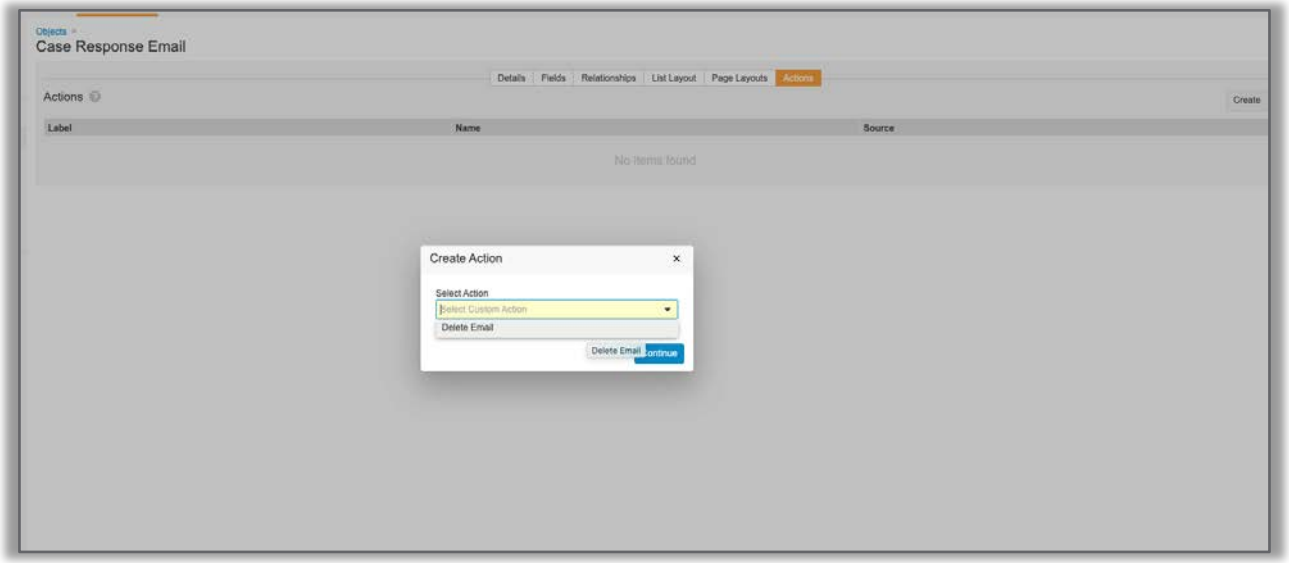
Allow Case Response Emails to be Deleted

- Configuration
  - Admin > Configuration > Objects > Case Response Email > Actions > Create Action



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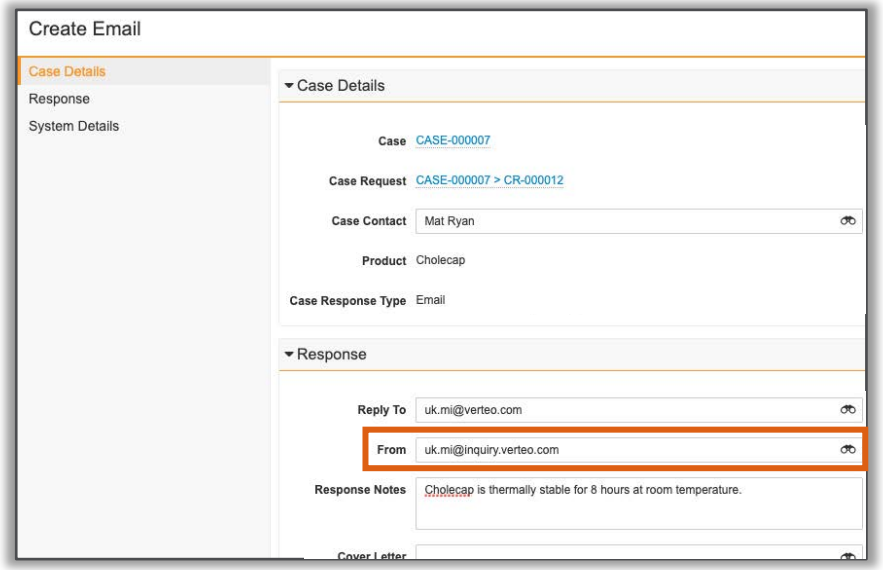
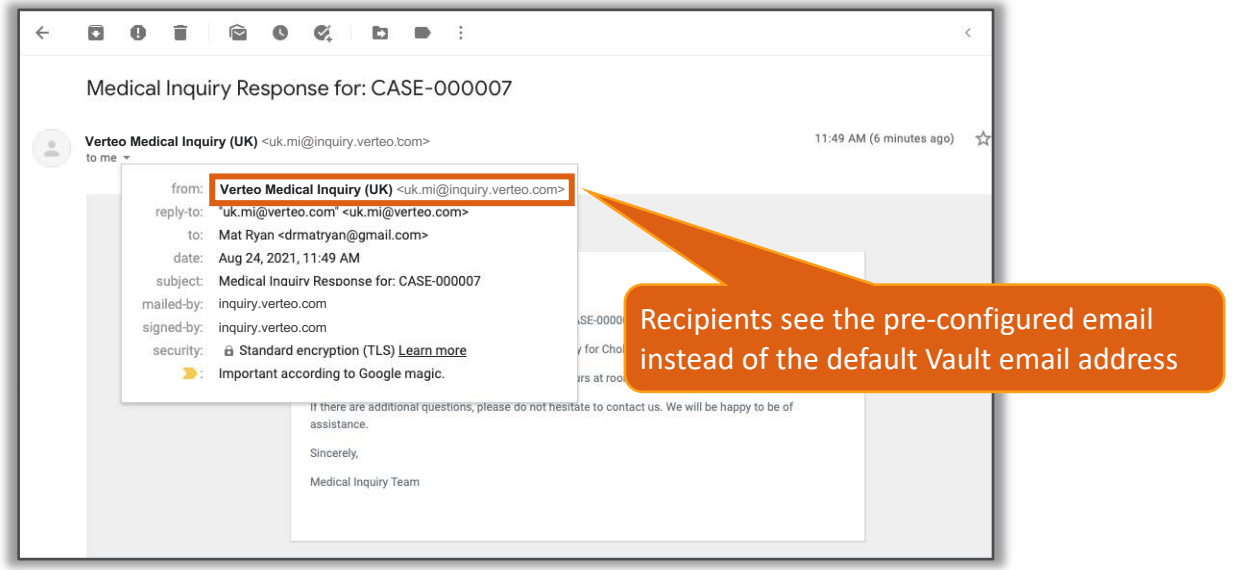
Customisable "From" Email Address for Case Response Emails

- Admins can configure “From” email address used for Medical Inquiry case response emails
  - When configured, contacts will see the sender as the address configured in the customer Vault rather than a generic Vault email address





  - Learn more about Configuring Medical Inquiry Emails

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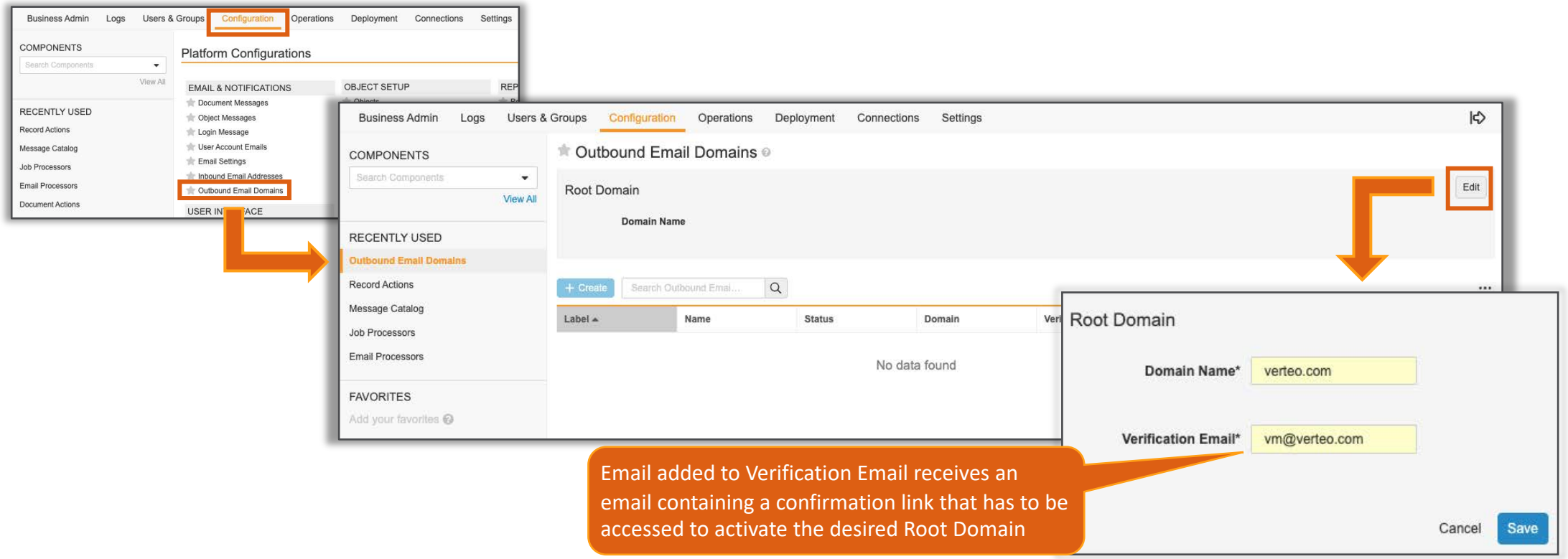
Customisable "From" Email Address for Case Response Emails

- Configuration
  - Before configuring *From* email addresses, *Root Domain* has to be configured:
    Admin > Configuration > Email & Notifications > Outbound Email Domains > Root Domain
    - Check your email inbox for the verification email and click the link
    - Once you verify your domain, you can return to Outbound Email Domains.



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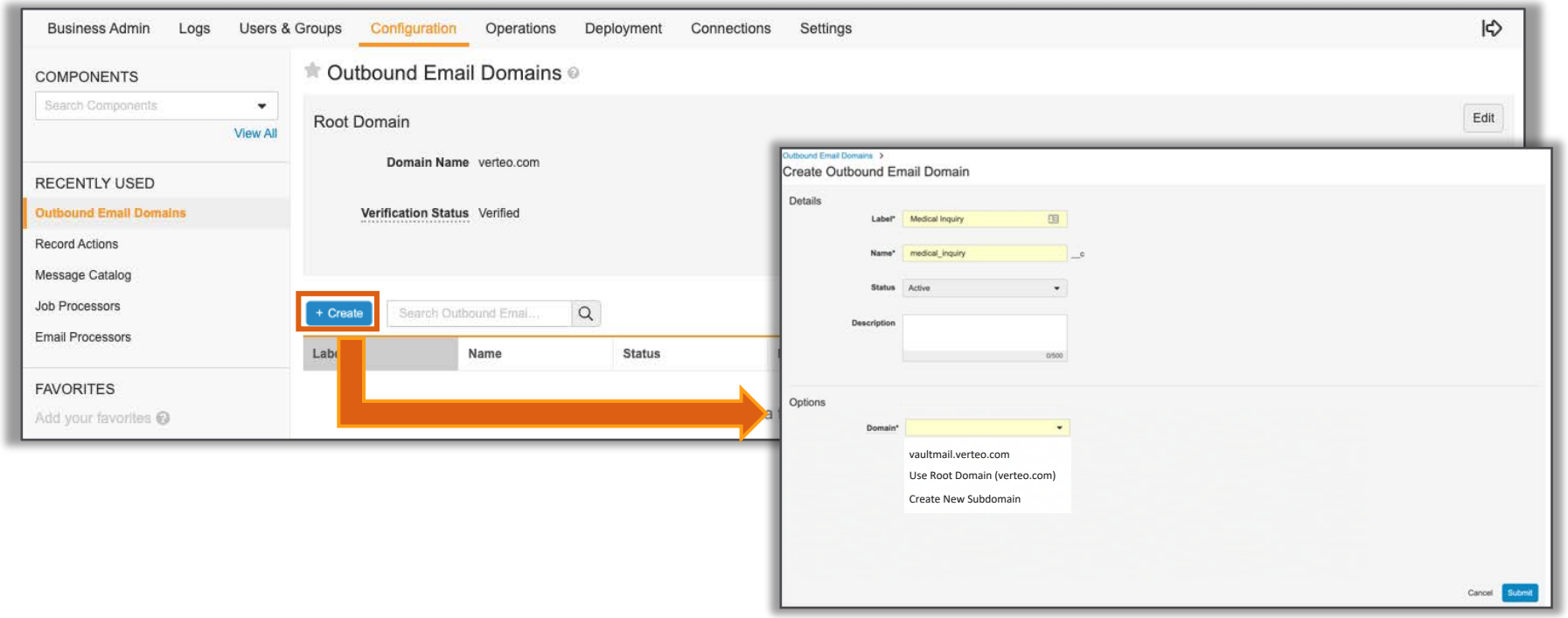
Customisable "From" Email Address for Case Response Emails

- Configuration
  - Once *Root Domain* is confirmed, and *Verification Status* updates to Verified, proceed with adding outbound email domains:
    Admin > Configuration > Email & Notifications > Outbound Email Domains > Create
    - If you are creating a new subdomain, click OK and enter a Subdomain. You can create a maximum of five (5) subdomains with one root domain across all Vaults
  - Learn more about Configuring Outbound Email Addresses



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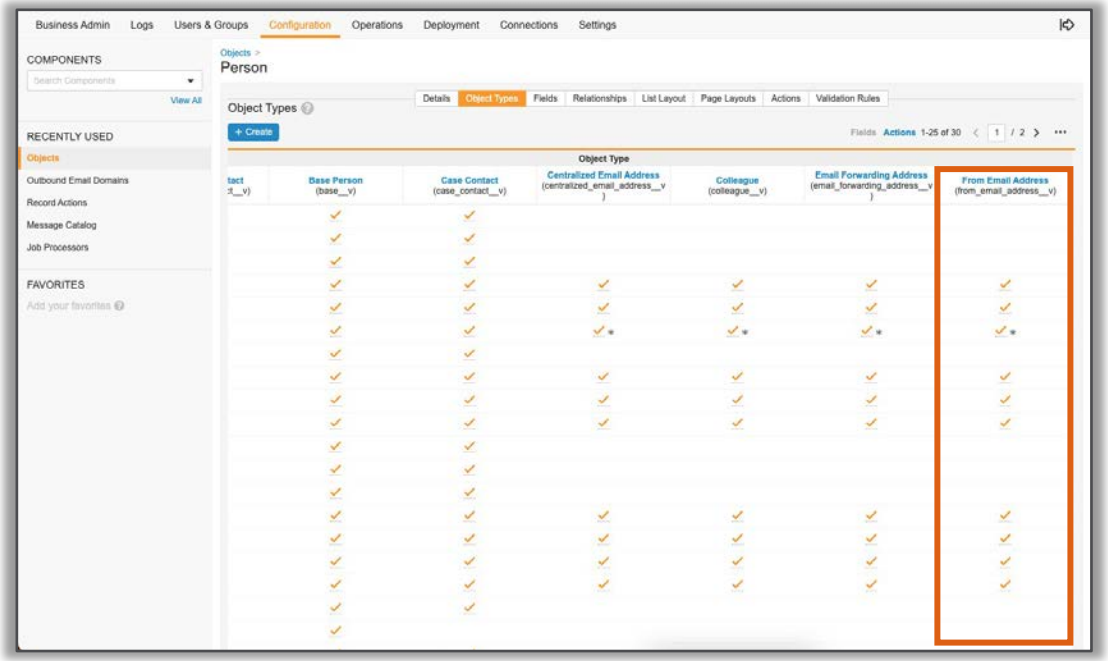
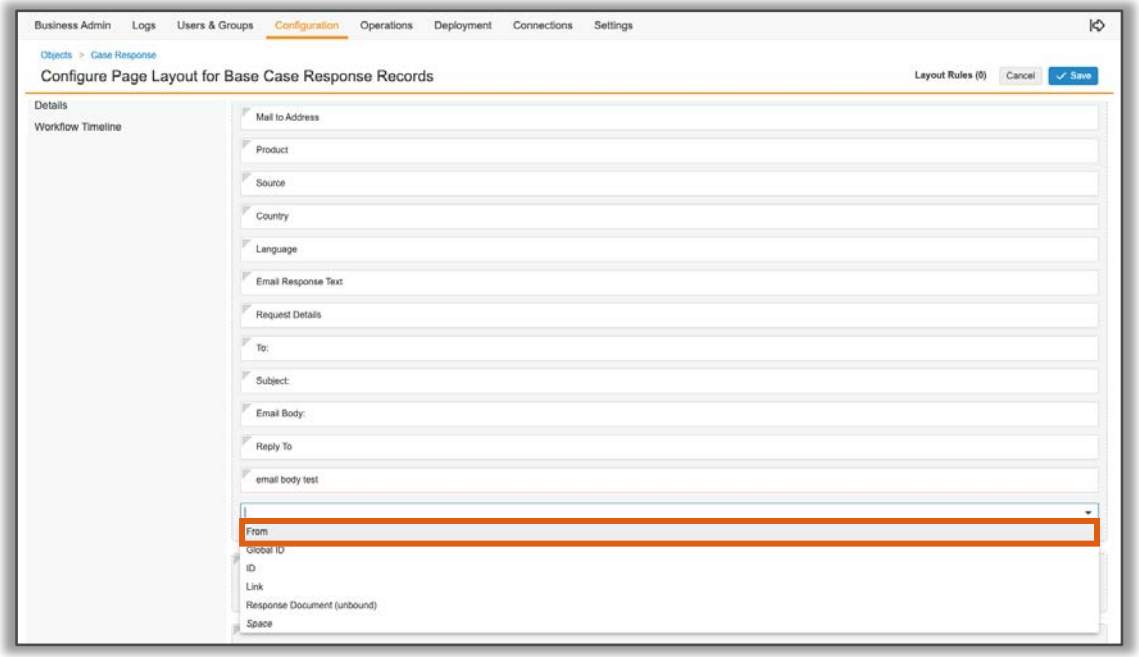
Customisable "From" Email Address for Case Response Emails

- Configuration
  - With Email Domains configured, ensure From Email Address is enabled:
    Admin > *Configuration* > *Objects* > *Person* > *Object Types* tab > Enable *From Email Address*
  - Add From field to the Case Response Detail Page Layout:
    Admin > *Configuration* > *Objects* > *Case Response* object > *Page Layouts* tab > *Case Response Detail Page Layout* > Add *From* field > Click *Save*
  - Specific From email address applied by Vault can be pre-defined. Learn more about using RecordByLabel function





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MultiChannel

CRM Document Field Label Updates

- The 22R1 release will include automatic CLM field label updates in PromoMats and MedComms

Document Field	Field	Existing Label Value	New Label Value (22R1)
crm_directory__v	Label	Directory	CRM Directory
crm_keyword__v	Label	Keyword	CRM Searchable Keywords
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)

- **Field labels will continue to be editable by customers**
- **Customers who don't want the updated labels can edit the labels back to the original text post release**

- As part of an overall effort to improve the experience with Veeva CRM, some of the CRM related document field labels are being updated to align with Veeva's recommendations and standard Vault template
  - This update helps to provide a consistent naming convention with newer fields in the Commercial data model and bring alignment with the Veeva's help documentation
  - Learn more about CRM Vault Metadata Sync

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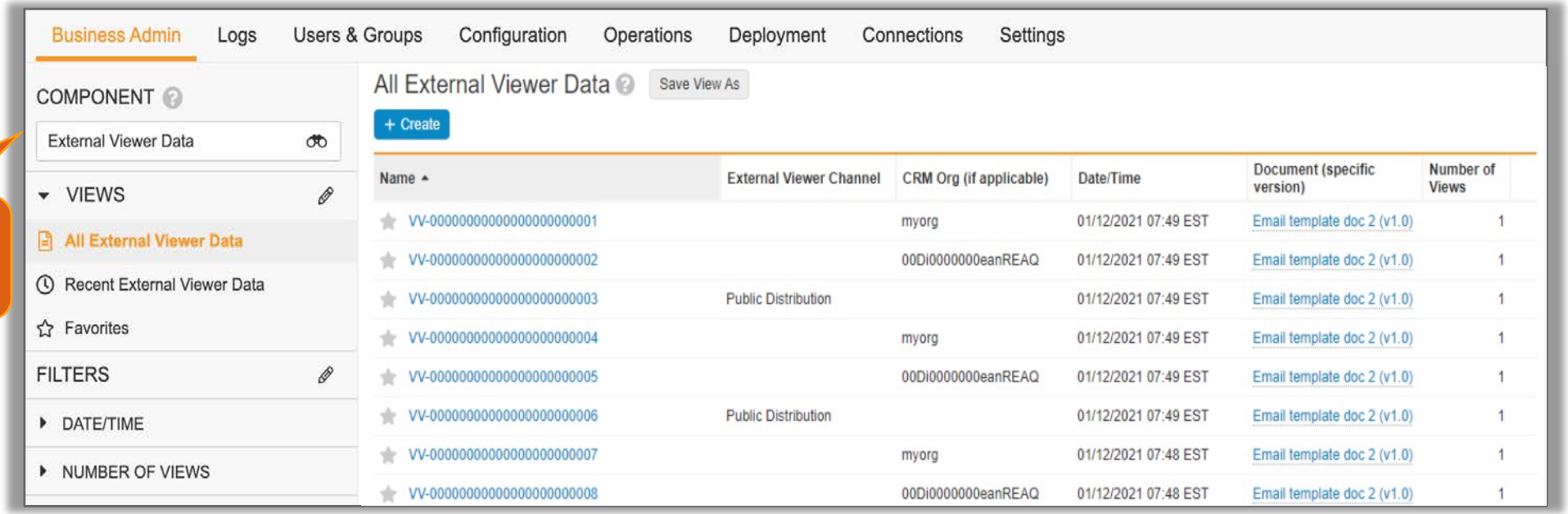
External Viewer: Number Of Views

- A new object called ‘External Viewer Data’ allows users to report on the number of document views through an external viewer (CLM, Public Content Distribution, Website, or SharePoint)

Add the ‘External Viewer Data’ object to display in Business Admin menu



- Considerations
  - Update user permissions to read the ‘External Viewer Data’ object and to run reports
  - Access a sample VPK containing an ‘External Viewer Data’ report and dashboard Upload VPK for report and report type: ‘External Viewer Data’ VPK
  - Learn more about the External Viewer

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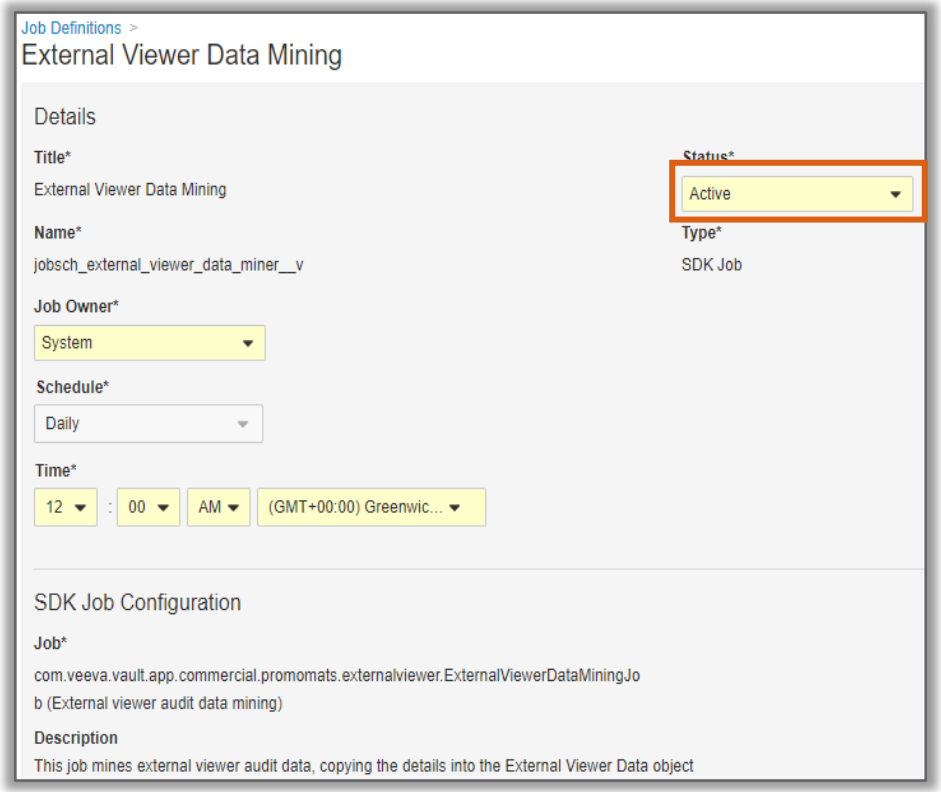
External Viewer: Number Of Views

- Configuration
  - Activate Job ’External Viewer Data Mining’ by navigating to Admin > Operations > Job Definitions > [Job] > Activate



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Resources

Resources

- Contact your Customer Success Manger or Managed Services Consultant
- Email: VaultCustomerSuccess@veeva.com
- 22R1 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: https://platform.veevavault.help/en/lr/

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Appendix

Platform Data Model Changes

- The following component was added to Vault to support the ‘Editable Bookmark’ feature:
  - *Bookmarks Edited* (bookmarks_edited__sys)
- Added the *Generic* (generic__sys) value to the standard *Reference Lookup Type* picklist to support the ‘Enhancements to Reference Lookups’ feature
- Added the *Locked Document Count* (locked_doc_count__sys) field to the *EDL Item* (edl_item__v) object to support the ‘EDLs: Configurable States for Document Version Locking’ feature
- Added the *Full Data File* (full_data_file__sys) field and *Full Data Export* (full_data_export__sys) type to the *Scheduled Data Exports* (scheduled_data_export__sys) object to support the ‘Scheduled Data Exports: Initial Full Data Export’ feature
- Added the *Annotations (Permalinks)* (annotations_permalink__v) document field to support the ‘Annotate Usability Improvements’ feature
- Added Question Design Reference Document (question_design_reference_document__sys) as a child object of the Question Design object to support the ‘Checklists: Add Reference Documents to Questions’ feature

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Platform Data Model Changes

- Made the following changes to support the Workdays & Holidays feature:
  - Added the *Holiday Schedule* (holiday_schedule__sys) object and its child object *Holiday* (holiday__sys)
  - Added the *Holiday Schedule* (holiday_schedule__sys) reference field to the *User* object
- Activated the existing but inactive *Section Dependency* object type (section_dependency__sys) to support the 'Checklists: Dependent Sections' feature

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Commercial Data Model Changes

- Added the following components to MedComms and PromoMats Vaults to support the ‘External Viewer: Number of Views’ feature
  - Added object *External Viewer Data* (external_viewer_data__veeva__v)
  - Added job *External Viewer Data Mining* (jobsch_external_viewer_data_miner__v)
- Added the following component to MedComms and PromoMats Vaults to support the ‘Automated Image Rendition: Include Source Document Name’ feature
  - Added flag *Include Document Name* to the Automated Image Rendition creation page
- The following changes were made to MedComms Vaults to support the ‘CRM Data Sharing: Support Merged CRM Accounts’ feature
  - Made the following fields on the *Merged Contact* (merged_contact__v) object optional:
    - *Original Contact* (original_contact__v)
    - *Merged Into Contact* (merged_into_contact__v)

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Commercial Data Model Changes

- The following components were added to MedComms and PromoMats Vaults to support the Customizable 'From' Email Address for Case Response Emails feature:
  - Added the object type *From Email Address* (from_email_address__v) on the *Person* (person__sys) object
  - Added the field *From* (from__v) on the *Case Response* (case_response__v) object, enabled for the *Email* (email__v) object type
- The following components were added to MedComms and PromoMats Vaults to support the CRM Document Field Label Updates feature:
  - Updated the labels on document field as follows:
    - *Publish for Veeva CRM (CLM)* (clm_content__v)
    - *Publish for Veeva CRM* (Cobrowse) (cobrowse_content__v)
    - *CRM Directory* (crm_directory__v)
    - *Hide from CLM Library* (crm_hidden__v)
    - *CRM Searchable Keywords* (crm_keyword__v)
    - *Publish for Veeva CRM (Portals)* (engage_content__v)
    - *Publish for Veeva CRM (URL)* (shareable_as_an_approved_link__v)
    - *Publish for Veeva CRM (WeChat)* (wechat_content_wec__v)

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eCTD Binder Generation Failure Notifications

- This feature will add a number of specific error messages if the eCTD binder fails to generate to help the user know what configuration change to make to fix the issue themselves
  - Learn more about Generating an eCTD Compliance Package

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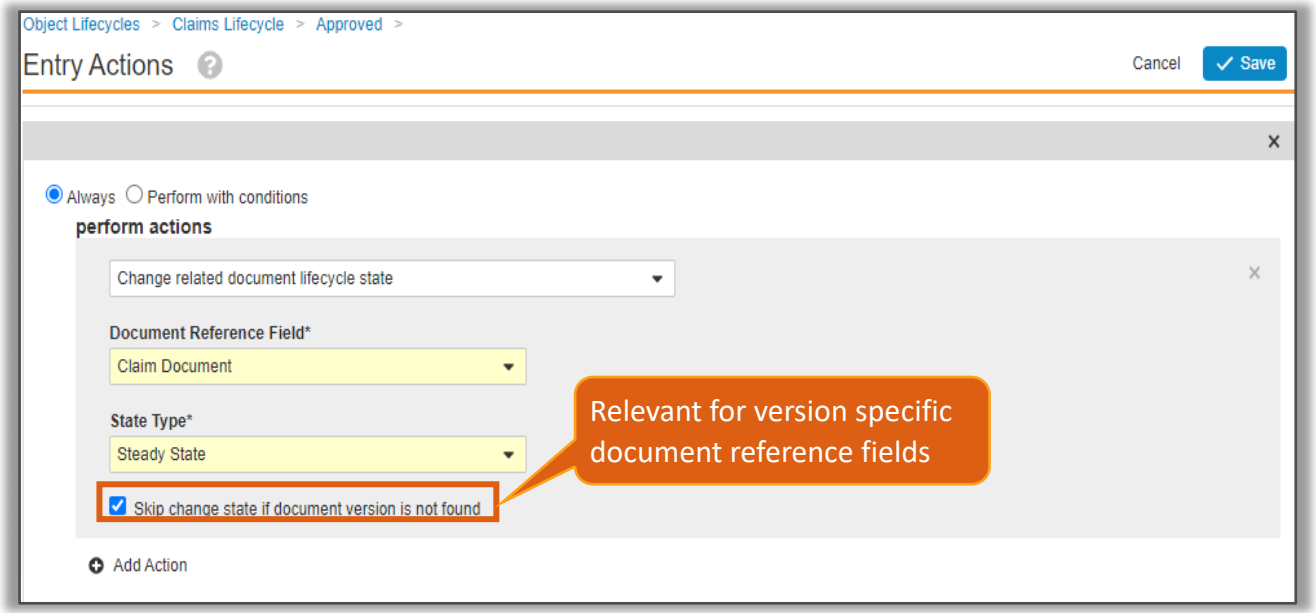
Skip Document State Change in Object Lifecycle Entry Action

- Object Lifecycle Entry Actions can be configured to skip a state change for related documents, referenced on an object, belonging to a steady state
  - This feature is only relevant for document reference fields on objects that are version specific
  - If the specific version is not found, it will now be skipped if configured
- Configuration
  - Admin > Config > Object Lifecycle > [Lifecycle] > [State] > Edit Entry Action



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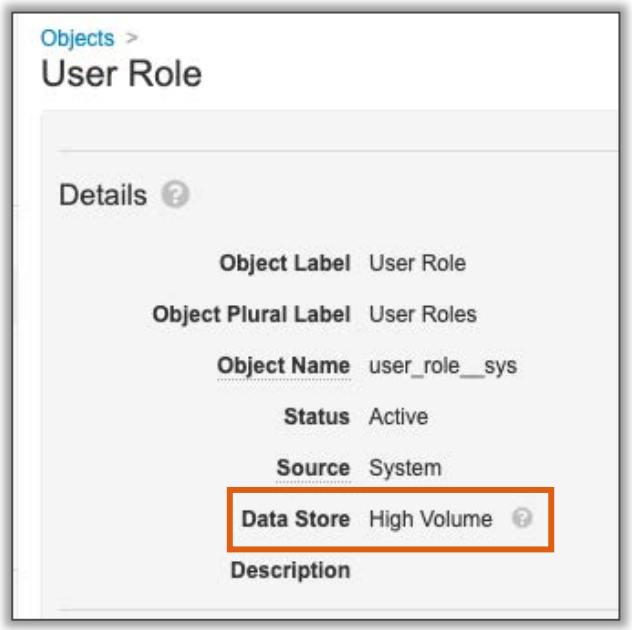
User Role Object Moving to HVO

- The *User Role* system object (user_role__sys) is moving to high volume to deliver increased performance and scalability



- Considerations
  - No “FIND” feature support in VQL
  - No search bar on the related Object section (user details page)
  - No facetted searches on HVO

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Object Control Security

- Object Controls are interface controls delivered by Vault Applications, allowing Admins to put them in the Object Record Detail Page layout to provide a tailored experience. For instance, in Vault Safety, users see object controls when viewing or editing a case object record

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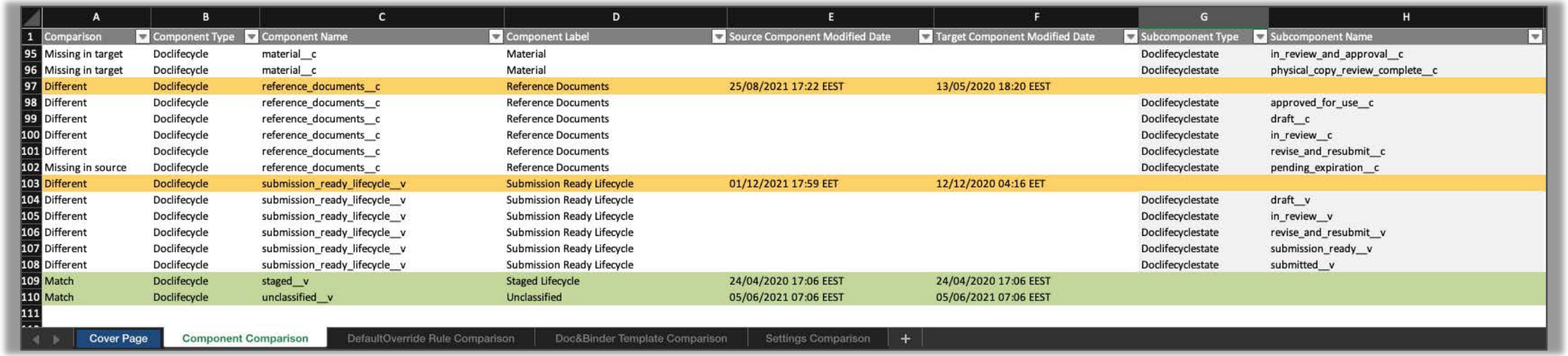
Vault Compare Report: Header Rows Frozen by Default

- Column Headers of Vault Compare report sheets are now frozen by default



	A	B	C	D	E	F	G	H
1	Comparison	Component Type	Component Name	Component Label	Source Component Modified Date	Target Component Modified Date	Subcomponent Type	Subcomponent Name
95	Missing in target	Doclifecycle	material__c	Material			Doclifecyclestate	in_review_and_approval__c
96	Missing in target	Doclifecycle	material__c	Material			Doclifecyclestate	physical_copy_review_complete__c
97	Different	Doclifecycle	reference_documents__c	Reference Documents	25/08/2021 17:22 EEST	13/05/2020 18:20 EEST		
98	Different	Doclifecycle	reference_documents__c	Reference Documents			Doclifecyclestate	approved_for_use__c
99	Different	Doclifecycle	reference_documents__c	Reference Documents			Doclifecyclestate	draft__c
100	Different	Doclifecycle	reference_documents__c	Reference Documents			Doclifecyclestate	in_review__c
101	Different	Doclifecycle	reference_documents__c	Reference Documents			Doclifecyclestate	revise_and_resubmit__c
102	Missing in source	Doclifecycle	reference_documents__c	Reference Documents			Doclifecyclestate	pending_expiration__c
103	Different	Doclifecycle	submission_ready_lifecycle__v	Submission Ready Lifecycle	01/12/2021 17:59 EET	12/12/2020 04:16 EET		
104	Different	Doclifecycle	submission_ready_lifecycle__v	Submission Ready Lifecycle			Doclifecyclestate	draft__v
105	Different	Doclifecycle	submission_ready_lifecycle__v	Submission Ready Lifecycle			Doclifecyclestate	in_review__v
106	Different	Doclifecycle	submission_ready_lifecycle__v	Submission Ready Lifecycle			Doclifecyclestate	revise_and_resubmit__v
107	Different	Doclifecycle	submission_ready_lifecycle__v	Submission Ready Lifecycle			Doclifecyclestate	submission_ready__v
108	Different	Doclifecycle	submission_ready_lifecycle__v	Submission Ready Lifecycle			Doclifecyclestate	submitted__v
109	Match	Doclifecycle	staged__v	Staged Lifecycle	24/04/2020 17:06 EEST	24/04/2020 17:06 EEST		
110	Match	Doclifecycle	unclassified__v	Unclassified	05/06/2021 07:06 EEST	05/06/2021 07:06 EEST		
111								

Cover Page | Component Comparison | DefaultOverride Rule Comparison | Doc&Binder Template Comparison | Settings Comparison | +

- Learn more about using Vault Compare Report

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Medical Inquiry: CRM Inquiry Pull Job Timing Enhancement

- This enhancement adjusts the date & time range used to retrieve medical inquiries from CRM and now uses the date & time of the last successful *Account* pull to ensure that the *Accounts* referenced are present in Vault
- Learn more about CRM *Inquiry* jobs

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Jobs: Disable Session ID Token in External URL Call Configuration

- Session ID tokens in the external URL call job configuration are no longer supported and will not work in this release
  - Please update your job definitions to use the *Post Session Credentials via Form Data with Key "Session.id"* option
  - Learn more about Sending Session IDs with Post Message

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System Vault Tokens

- Vault now includes the following system provided Vault tokens that developers can use to reference Vault information:
  - ${Vault.vault_dns__sys}
  - ${Vault.vault_id__sys}
  - ${Vault.vault_name__sys}
  - Learn more about Vault Tokens

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Object and Document Field Types for Integration Field Rules

- Vault Admins can configure the field type for an object or document Query field when creating field rules within Spark integration rules

- Learn more about Creating and Managing Spark Integration Rules

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Data VPK: Validate VQL in Dataset Filter

- Users are now able to validate Criteria VQL prior to saving a dataset filter

- Learn more about Outbound Migration Package Datasets
- Learn more about using VQL WHERE Clause

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Bulk Actions on Record Actions

- This feature allows our independent Veeva app developers and SDK developers to add a RecordAction that can be used in Bulk flow
  - Learn more about bulk object record actions

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Email to Vault: Create Records for Bounced Emails

- If you are using Email to Vault, there are now tools to help with debugging bounced emails
  - When Vault bounces an inbound email because it is considered spam or because the sender fails SPF or DKIM authenticity checks, it now creates an *Email* object record in the *Bounced* lifecycle state
- Considerations
  - A daily flash report could be created to alert admins to what has been marked as spam

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Thank you