

22R1 Commercial & Medical Content Release Education

April 2022



Icons

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

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 <i>Vault File Manager does not release at this time, and instead releases with the general release PODs</i>
April 22	Release to all general release PODs





Announcements

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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](#)




22R1: Office Online Support



21R2 Office Online Support stops



Collaborative Authoring replaces Office Online



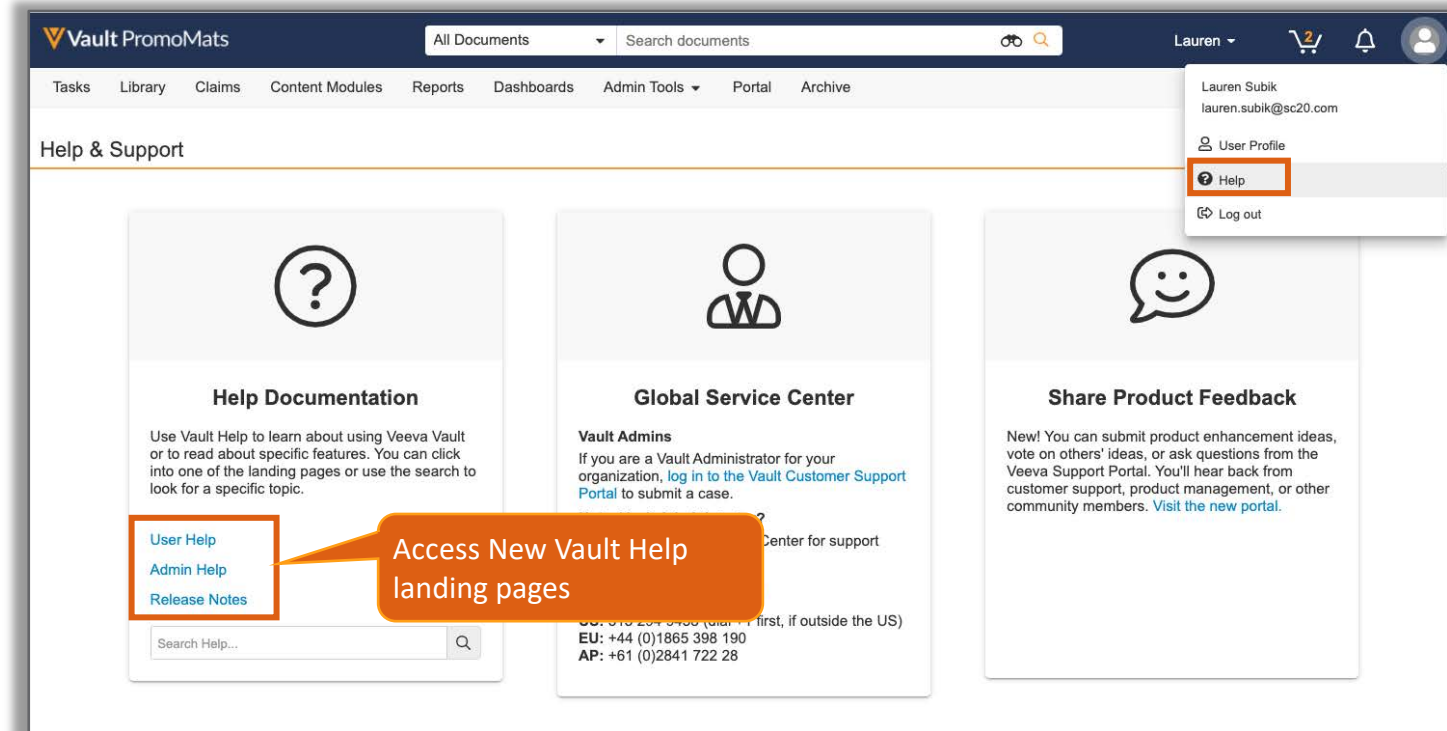
Users can check back in until 22R1

- Learn more about [Collaborative Authoring](#)



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





Learn More Links: Vault Help Update

New Help landing pages provide easy access and navigation to Vault specific Applications help content

Platform	Clinical Operations	Quality
RIM	PromoMats	MedComms

 Using Vault Get help with Vault's robust content management capabilities	 Administering Vault Get help with Vault's administration features	 Video Tutorials Learn about Vault navigation, search, documents, binders, dashboards, and more
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Learn More Links: Vault Help Update



The screenshot displays the Vault Help search interface. The main header shows 'Vault Help' and a search bar containing 'modular content'. Below the search bar, a list of search results is shown, including links to 'New in 21R1.2: RTF Renditions and more | Vault Help', 'New in 20R3.4: Link Annotations to Permalinks and more | Vault Help', 'What's New in 21R2 | Vault Help', 'New in 21R1.3: Share My Inbox Documents and more | Vault Help', 'New in 21R3.2: Export Report to Formatted Excel and more | Vault Help', 'What's New in 21R1 | Vault Help', and 'New in 21R3.4: Breadcrumb Enhancements for Object Tabs, and more | Vault Help'. A callout box on the left states: 'The Help search has a more robust topic search engine that will suggest help topic links for the search term'. A callout box on the right states: 'A term search will launch a popup list of Help page topic links that users can scroll'. A larger inset on the right shows a detailed view of the search results, listing various articles such as '21R2 Data Model Changes: Commercial | Vault Help', 'New in 21R3.2: Export Report to Formatted Excel and more | Va...', 'New in 21R1.2: RTF Renditions and more | Vault Help', 'New in 21R1.3: Share My Inbox Documents and more | Vault Help', 'Vault-Release-Impact-Assessment-21R2.pdf', 'Vault-Release-Impact-Assessment-21R2.xlsx', 'New in 20R3.4: Link Annotations to Permalinks and more | Vault ...', 'What's New in 21R2 | Vault Help', and 'New in 21R3.4: Breadcrumb Enhancements for Object Tabs, an...'. The bottom of the inset shows 'Showing 1-10 of 12 for "modular content"' and navigation buttons '1 2 NEXT >'.



Learn More Links: Vault Help Update



Vault Help | Platform

Using Vault ▾ Administering Vault ▾ Release Notes ▾

Administering Vault

Search Veeva Vault Help...

APPLICATION SUITE

- Platform
- Clinical Operations
- Quality
- RIM
- PromoMats
- MedComms

Administrative Basics

Vault Loader

Business Admin

Logs

Users & Groups

Configuration

Operations

Deployment

Connections

Settings

Note: This is the new official site for Veeva Vault Help. [Classic version of Vault Help.](#)

Callout 1: Easily switch to different application suites with the application picker

Callout 2: Navigate Help general Using Vault, Vault Administration, and Vault Release topics sections using the dropdown menu

Callout 3: Help landing pages are organized with quick links to topic areas

Callout 4: Users can switch back to the classic version of the Vault Help pages





Learn More Links: Vault Help Update

The screenshot displays the Veeva Vault Help interface. On the left, a navigation panel is visible, highlighting the '21R3.5' version and 'New Features' section. The main content area shows a help article titled 'About the Create Button' under the 'Vault Basics' category. A callout box highlights the navigation panel, stating: 'Help pages are enhanced with a navigation panel that outlines Topic and their subtopics areas'. Another callout box highlights the 'About the Create Button' subtopic in the navigation panel.

Navigation Panel (Left):

- 21R3.5
 - New Features
 - Usability & UI Updates
 - Administration
 - Clinical Operations
 - Commercial
 - Quality
 - Regulatory
 - SiteVault
 - QualityOne
 - Veeva Claims
 - Enablement Details
 - Fixed Issues
 - Veeva Vault Mobile 213.5.0
 - Release Notes
 - Known Issues
- 21R3.4
- 21R3.2
- 21R2.4

Help Article Content (Right):

Note: This is the new official site for Veeva Vault Help. [Classic version of Vault Help.](#)

About the Create Button

The **Create** button is available in your Vault's menu bar. This button allows you to create:

- Documents from files on your computer
- Documents from configured templates
- Content placeholders
- Binders
- CrossLinks
- User tasks
- Object records
- Reports
- Dashboards

How to Use the Create Button

The **Create** button appears everywhere in your Vault except the [Admin](#) area. What the **Create** button creates depends on the context. For example, if you click **Create** from the *Library*, it will create a new document. See the table below for details.

You can click the arrow on the right side of the **Create** button to view the *Create* drop-down menu and select either the contextual option, **Document**, **User Task**, or one of the three most recent *Create* options you've used.





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](#)



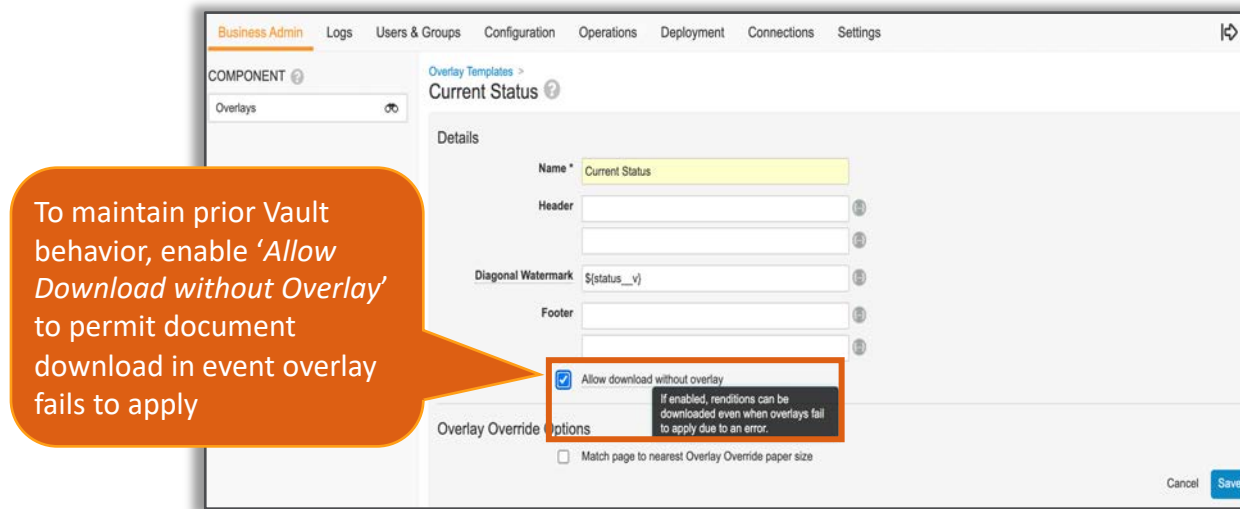


Documents



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](#)





Copy Text from Viewer

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

The screenshot displays the Vault PromoMats interface. On the left, a document viewer shows a medical illustration of a blood vessel with red blood cells. A text box is selected, containing the text: "The first and only statin approved for the treatment of hypercholesterolaemia in teenagers with familial hypercholesterolaemia¹". An orange callout bubble points to this text, stating: "Text is copied from clipboard by holding down the 'c' key". On the right, a metadata panel shows details for "leavepiece-cm (v0.2)". Below the viewer, a large white box displays the copied text: "The first and only statin approved for the treatment of hypercholesterolaemia in teenagers with familial hypercholesterolaemia¹". Above this box, a date and time stamp reads "January 11, 2022 at 10:41 AM". To the right of the viewer, another orange callout bubble points to a green box containing the text "Text copied", with a message above it stating: "A message confirming the text copied to your clipboard appears".

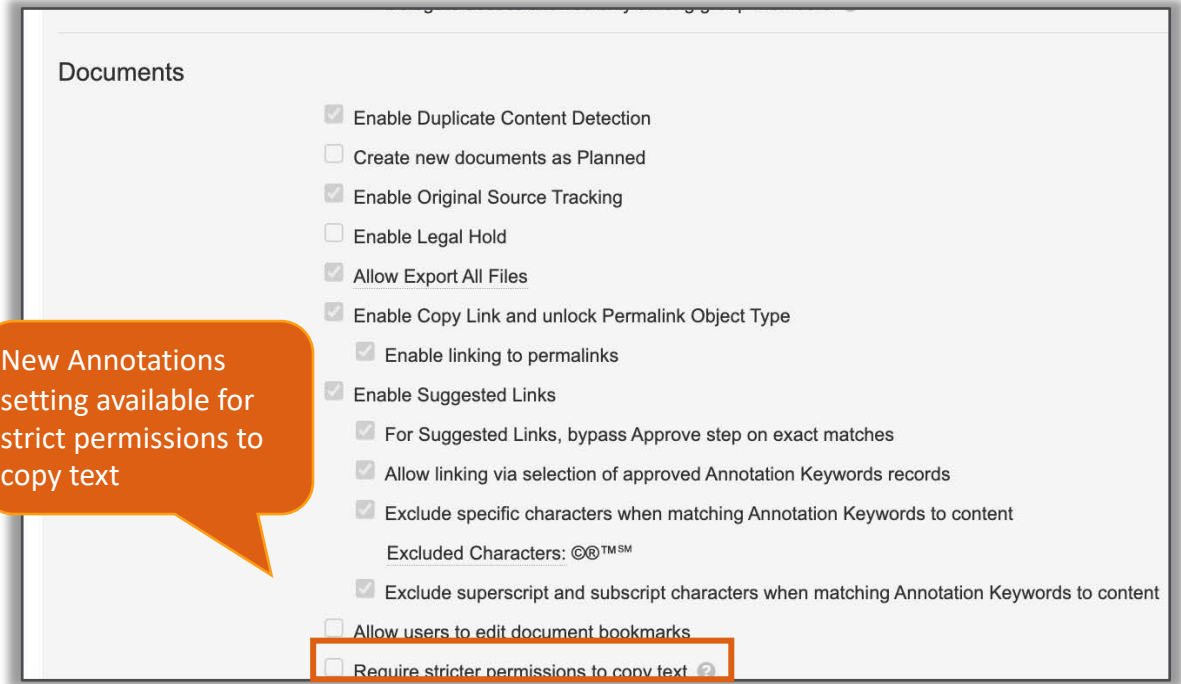


Copy Text from Viewer

- Considerations

- To opt into strict permissions to copy text:

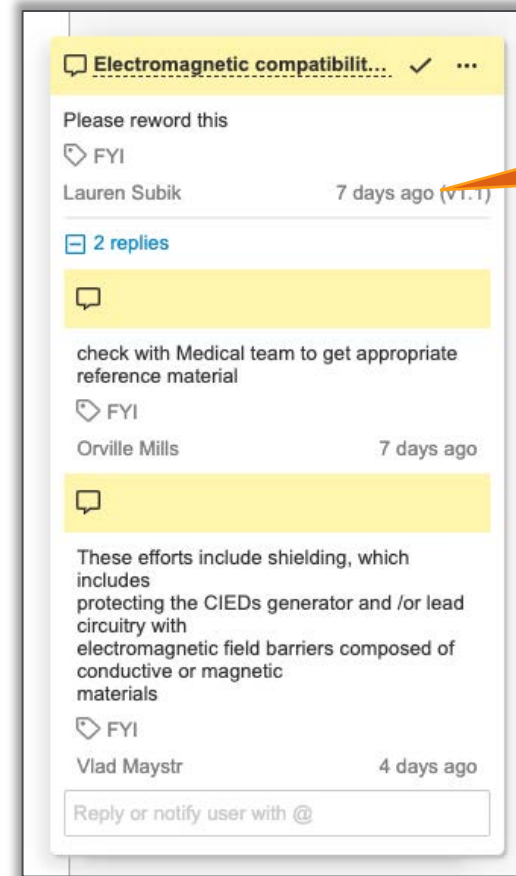
- Admin > Settings > General Settings > Annotations > Enable 'Require Stricter Permissions to Copy Text'
 - Users must have one of the following permissions to Copy Text on a piece: Download Source, Download Rendition, or Annotate
 - Learn more about [Copy Text from Viewer](#)





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](#)

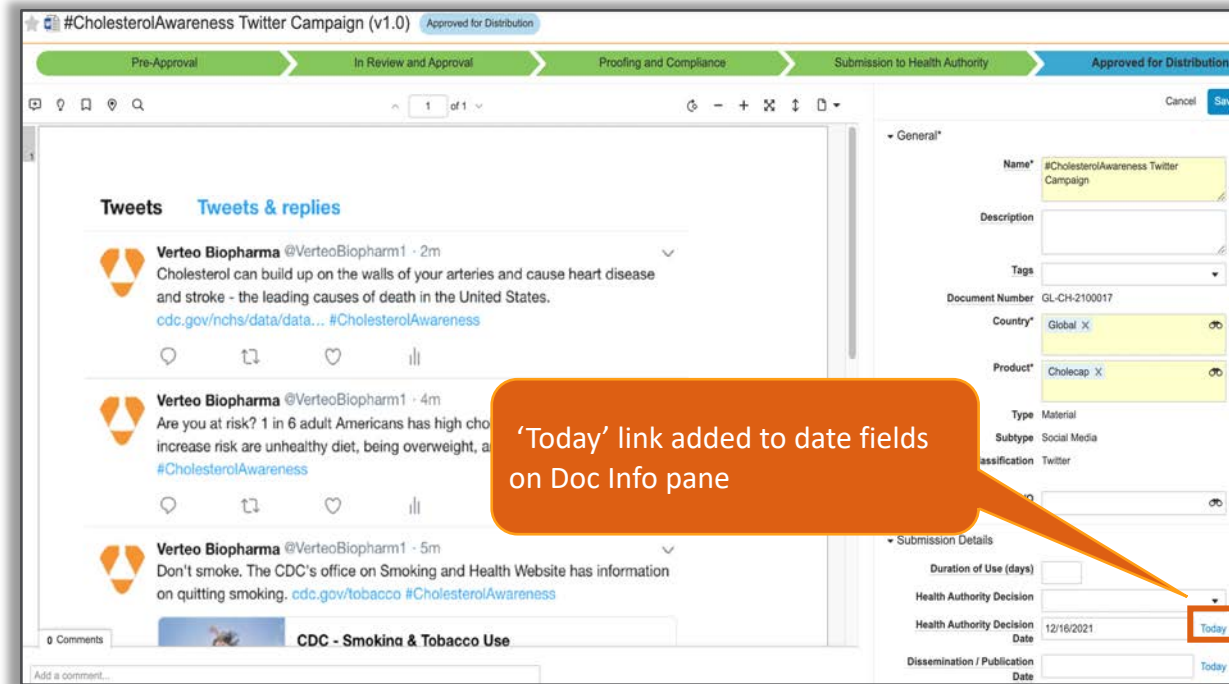


A notification is sent out to the note author of the annotation thread

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](#)



Text Indexing & Combination Enhancements



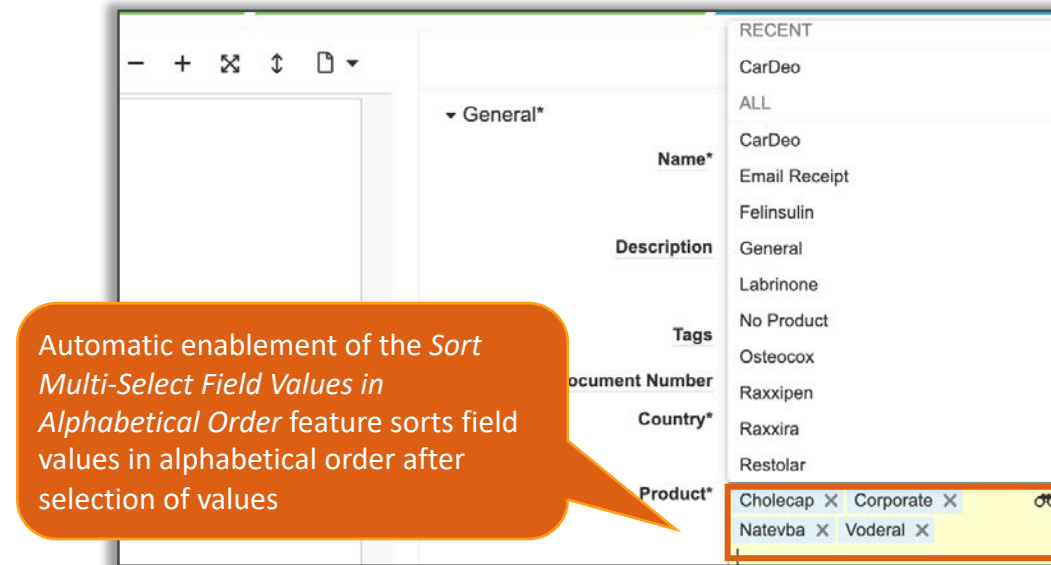
- The search within Document Viewer now correctly indexes, finds, and highlights text in documents that contain word separating characters including periods, commas, semicolons, dashes, and quotation marks

The screenshot displays the Document Viewer interface for a document titled "AVEG 027 Clinical Study Report (v0.1)". The document status is "Draft". A search bar contains the text "1.0". A callout box explains: "A 'Find in Document' search for a number with a decimal highlighted correct results in document". The search results show "1" of 22 matches. The document content displays "AVEG 027 Clinical Study Report | VV-TMF-00085 | 1.0", where "1.0" is highlighted.



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](#)



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

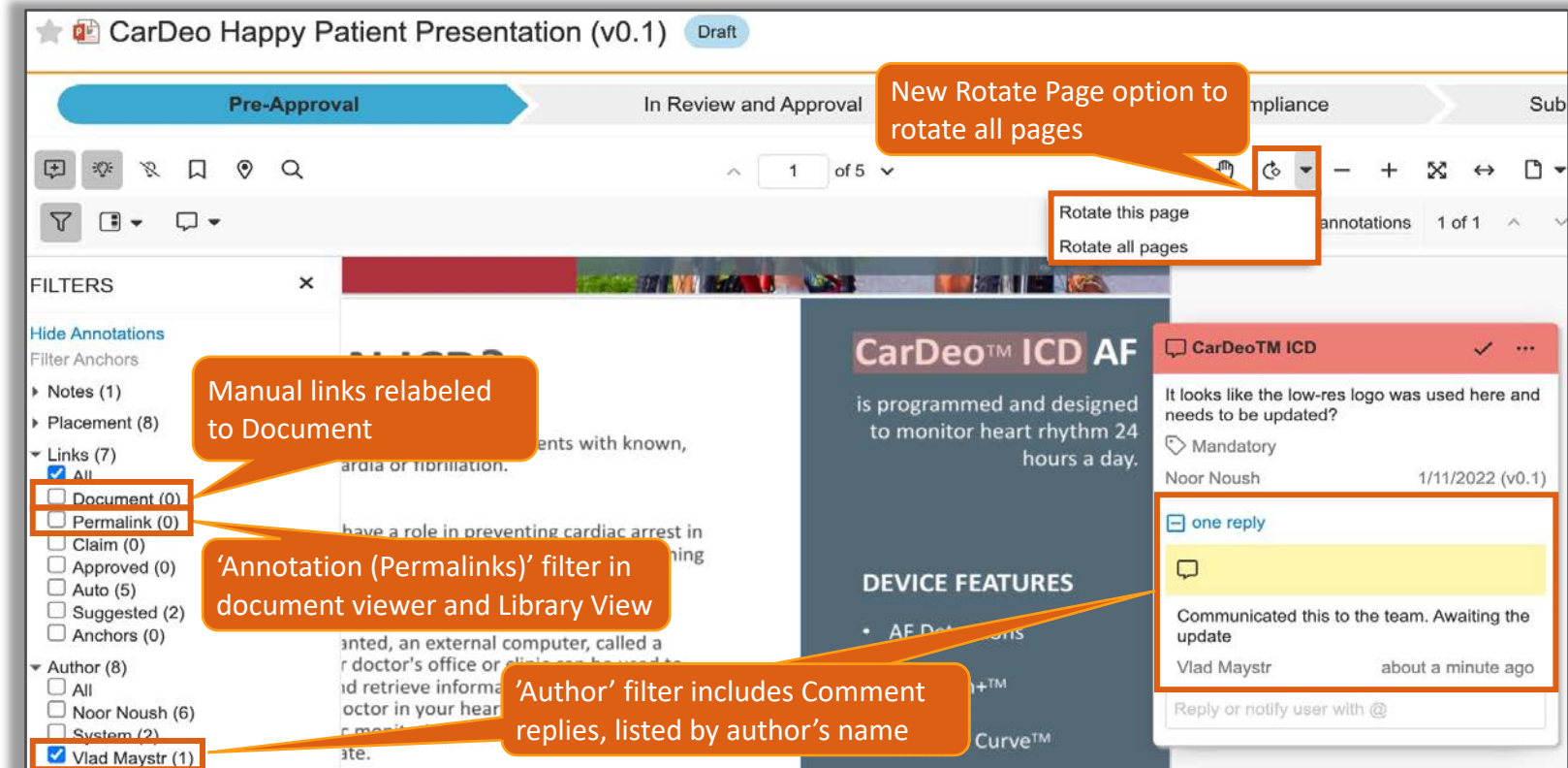
- Rotate page now includes two options: Rotate Current Page and Rotate All Pages

- 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



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](#)

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

Collaborative Authoring Error Log

Timestamp is in the range 10/01/2021 to 01/31/2022

Add filter Apply

Username	Document Id	Major Version	Minor Version	Timestamp	Request Id	Collaborative Authoring Action	Error
admin@smoketest.com	5	0	1	1/30/2022 4:24 PM PST	0fef72ff-450e-4f79-9d0b-11122bb7cf61	Check In	404: Not Found Download full trace
admin@smoketest.com	1	0	1	1/25/2022 1:03 PM PST	11f329f9-bc42-4cd6-a2cd-4ae1869ab777	Save to Vault	404: Not Found Download full trace
admin@smoketest.com	1	0	1	1/25/2022 10:09 AM PST	3a2c5898-5b36-4565-953d-74164b365c4f	Check In	400: Bad Request Download full trace

• The table will display 25 errors per page
• The columns in the table cannot be edited

Users can download full stack trace for an error by clicking 'download full trace' link



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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- 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](#)



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

New option to upload files from Google Drive when Creating Draft

New option to upload files from Google Drive when Uploading New Version

New option to upload file from Google Drive when uploading a file to a Vault Placeholder

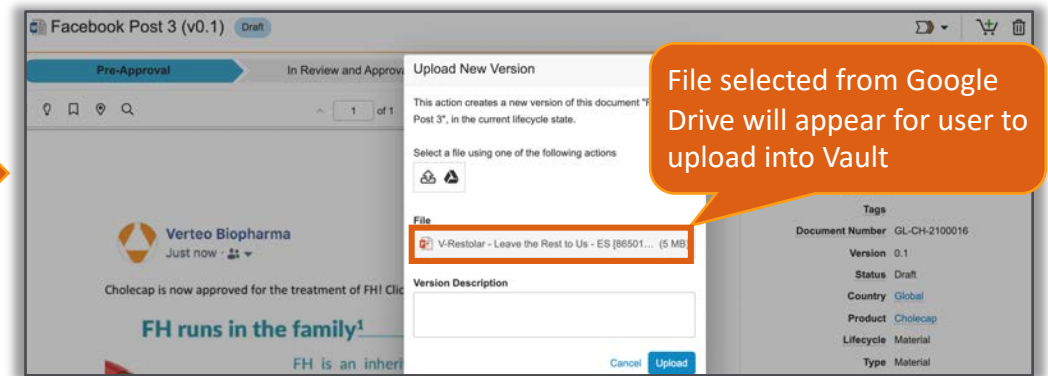
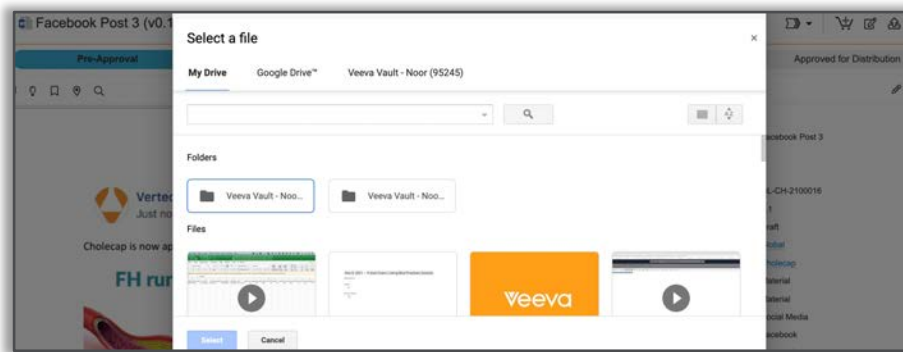
When creating a new document in Vault from Google Drive, users can select multiple Google Drive files



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



Google Drive Integration Enhancements

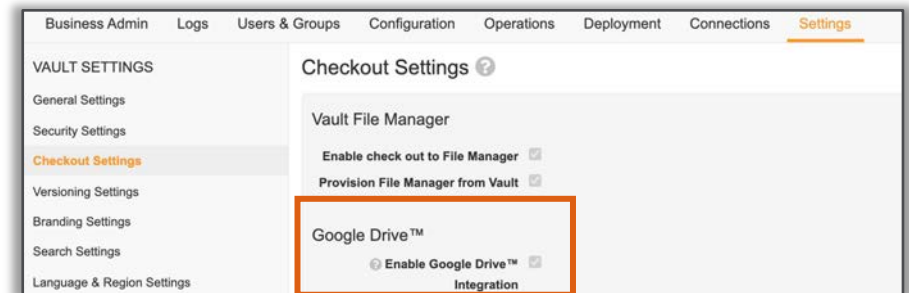


- Considerations

- 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'



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

The 'Properties' dialog box has tabs for General, Summary, Statistics, Contents, and Custom. The 'General' tab is active. Fields are as follows:

Title:	Title to document
Subject:	Subject to change
Author:	Author Writing
Manager:	
Company:	
Category:	
Keywords:	Keyword1 Keyword2
Comments:	
Hyperlink base:	
Template:	Normal.dotm

Save Thumbnails for All Word Documents

Buttons: OK, Cancel

Viewable Rendition Properties:

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

The 'Document Properties' dialog box has tabs for Description, Security, Fonts, Initial View, Custom, and Advanced. The 'Description' tab is active. Fields are as follows:

Title:	Title to document
Author:	Author Writing
Subject:	Subject to change
Keywords:	Keyword1 Keyword2

Created: 6/21/21, 2:28:31 PM
Modified: 6/21/21, 2:28:31 PM
Application: Microsoft® Word for Microsoft 365

Advanced section:

PDF Producer:	Microsoft® Word for Microsoft 365
PDF Version:	1.7 (Acrobat 8.x)
Location:	/Users/jamiefalzon/Downloads/
File Size:	314.24 KB (321,779 Bytes)
Page Size:	8.50 x 11.00 in
Number of Pages:	8
Tagged PDF:	Yes
Fast Web View:	No

Buttons: Help, Cancel, OK



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'*

The screenshot shows the 'Settings' page in the Veeva Systems administration interface. The left sidebar contains various settings categories, with 'Rendition Settings' highlighted. The main content area is divided into several sections:

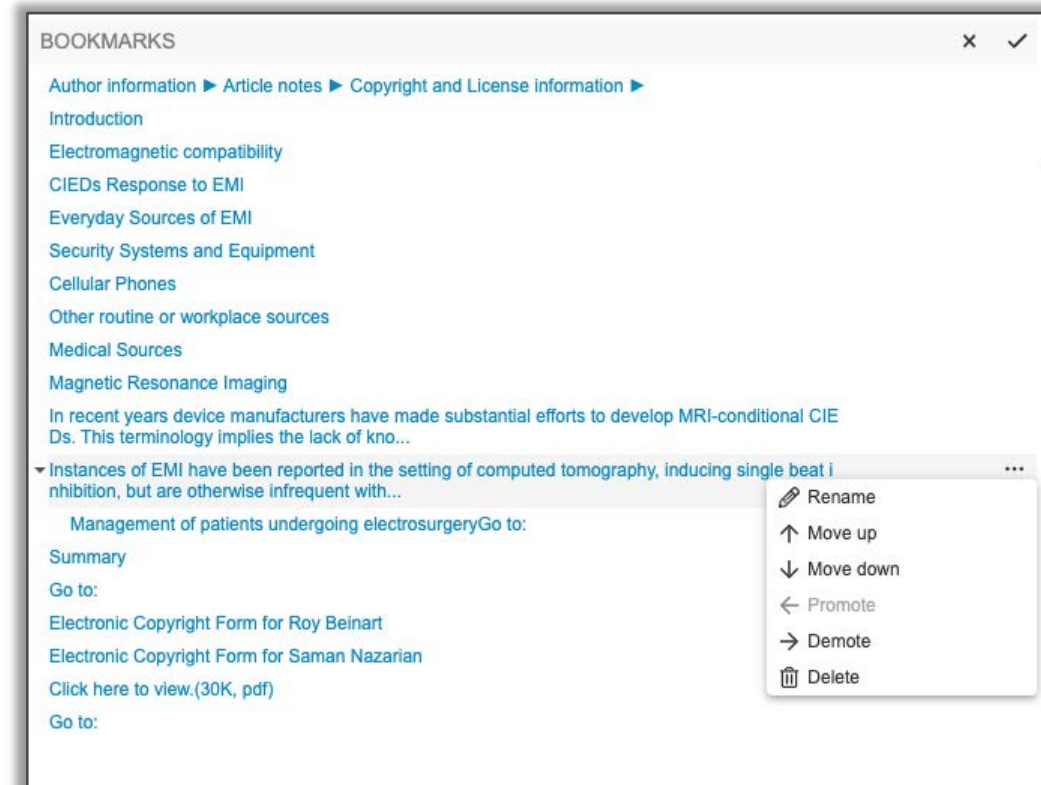
- Bookmark & Link Settings:** Includes checkboxes for 'Generate bookmarks based on Table of Contents and Lists of Figures' (checked), 'Generate bookmarks for Title Style' (unchecked), 'Set link text to blue' (checked), and 'Auto generate bookmarks for captions' (unchecked). There is also a dropdown for 'Expand PDF bookmarks to show' set to 'Level One'.
- Rendition Display:** Includes checkboxes for 'Do not show Markup in Viewable Renditions for Word documents' (unchecked), 'Always show Speaker Notes in Viewable Renditions for PowerPoint documents' (unchecked), and 'Allow viewing and annotation of protected PDF files' (checked).
- PDF Format:** Includes radio buttons for 'Generate PDF Rendition' (selected) and 'Generate PDF/A-1b Compliant Rendition' (unselected).
- Protected PDF:** Includes a checkbox for 'Generate Vault Protected PDFs' (unchecked) and three dropdown menus for 'PDF Print Settings', 'PDF Edit Settings', and 'Content Copying Settings', all set to 'None'.
- Merge Fields:** Includes a checkbox for 'Prevent Merge in Steady State' (checked).
- Rendition Metadata:** Includes a checkbox for 'Include source document properties in the Viewable Rendition' (checked), which is highlighted with a red box.

At the bottom right of the page, there are 'Cancel' and 'Save' buttons.



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”





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](#)



Caption Bookmark Exclusions

- Configuration

- Admin > Settings > Rendition Settings > Bookmark & Link Settings > *Exclude Captions of Type* picklist

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

General Settings
Security Settings
Checkout Settings
Versioning Settings
Branding Settings
Search Settings
Language & R
Rendition Set
Help Settings
Application Se
Scheduled Da

Font Embedding
 Default embedding
 Embed font subsets
 Embed full fonts

Bookmark & Link Settings
 Generate bookmarks
 Generate bookmarks
 Set link text to blue
Expand PDF bookmarks
 Auto generate bookmarks for captions
 Generate "List of ..." bookmark sections per caption type

Exclude Captions of Type |
Table
Figure
SeqTableNote

Rendition Display
 Do not show Markup in Vie
 Always show Speaker Notes in Viewable Renditions for PowerPoint documents
 Allow viewing and annotation of protected PDF files

DOMAIN SETTINGS
Domain Information
Security Policies
Network Access Rules
SAML Profiles

Callouts:
New 'Exclude Contents of Type' option available in Rendition Settings and Rendition Profiles
Generate 'Lists of...' Setting now accessible by Admins for enablement

- Admin > Business Admin > All Picklists > Caption Exclusions > Edit *Caption Exclusions* picklist

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

COMPONENT ?
Caption Exclusions

Picklists > **Caption Exclusions ?**

Details
Label: Caption Exclusions
Name: caption_exclusions__sys
Source: System Picklist
Used in: Rendition Profile > Exclude captions of type (caption_bookmarks_exclusion_types__sys)

Picklist values Sort A - Z

Picklist Value Label	Picklist Value Name	Picklist Status Value
Table	table	__sys Active
Figure	figure	__sys Active
SeqTableNote	seq_table_note	__sys Active

Type new value and hit 'Enter' to add



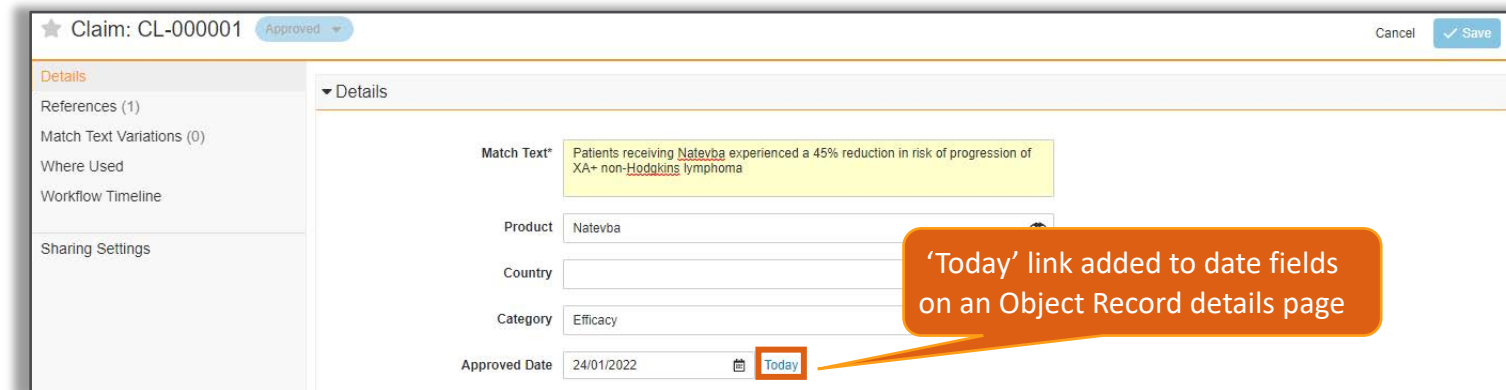


Objects

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](#)



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](#)



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

Name	Verdict	Reason
Beach and Palm tree Ad - 19R3 MDWF Demo	Revise and Resubmit	ISI issue
PP-CC/US/2019/0005 United States Dog AD - 19R3 MDWF Demo	Ready for Approval	



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

Remove Document from Envelope

You are about to remove "Beach and Palm tree Ad - 19R3 MDWF Demo" from the envelope. This action cannot be undone. Are you sure you wish to continue?

Cancel Continue

Timeline view showing the document removal action and any verdict information

- This enhancement also enables reporting and notification tokens on Verdicts to capture removed documents
- Considerations
 - When a document is removed, its state is set to Removed in the Envelope
 - Learn more about [Using Document Workflows](#)



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

Click the active chevron icon to display the workflow information

- Workflow Owner Information
- Open Tasks
- Task Status
- Assignees
- Available Actions

The screenshot shows a workflow for 'Beach Cove Ad - 19R3 MDFW Demo (v0.1)' in the 'Review' stage. The chevron card displays the following information:

- Review Committee Meeting** (Active)
- CSM User | Started on: 1/3/2022 9:40 AM EST
- Open Tasks**
- Committee Review** (Active)
 - CSM User
 - Due: 1/3/2022
- Assess Meeting Outcome** (Active)
 - CSM User
 - Due: 1/4/2022

Available actions for the tasks include: Reassign, Update Task Due Date, and Cancel Task.

– Learn more about [Configuring Lifecycle Stages](#)

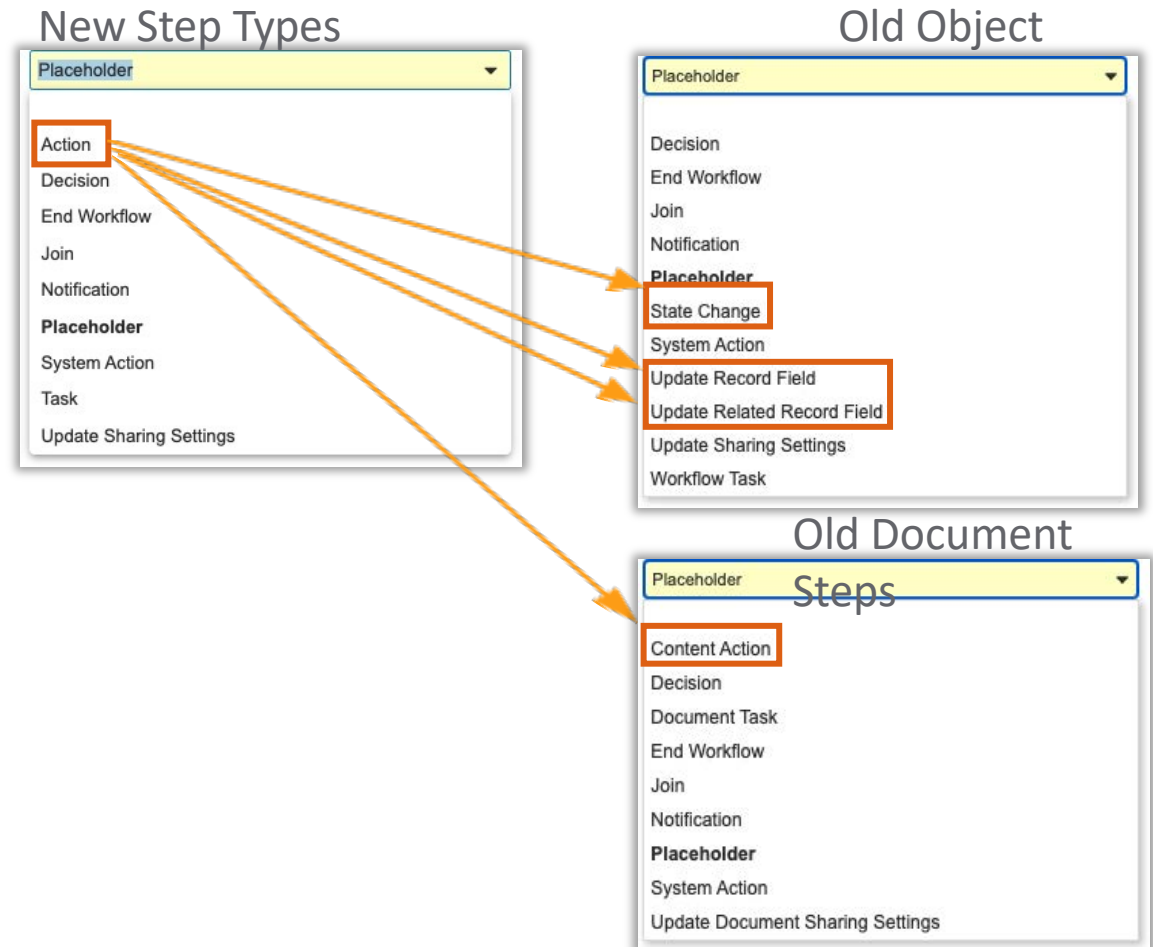




Consistent Steps Across Workflows

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

Object State Changes and Update Record Fields can now execute based on conditions





Consistent Steps Across Workflows

- The Object and Document workflow Task steps are relabeled to 'Task'

Create Step

Details

Label*

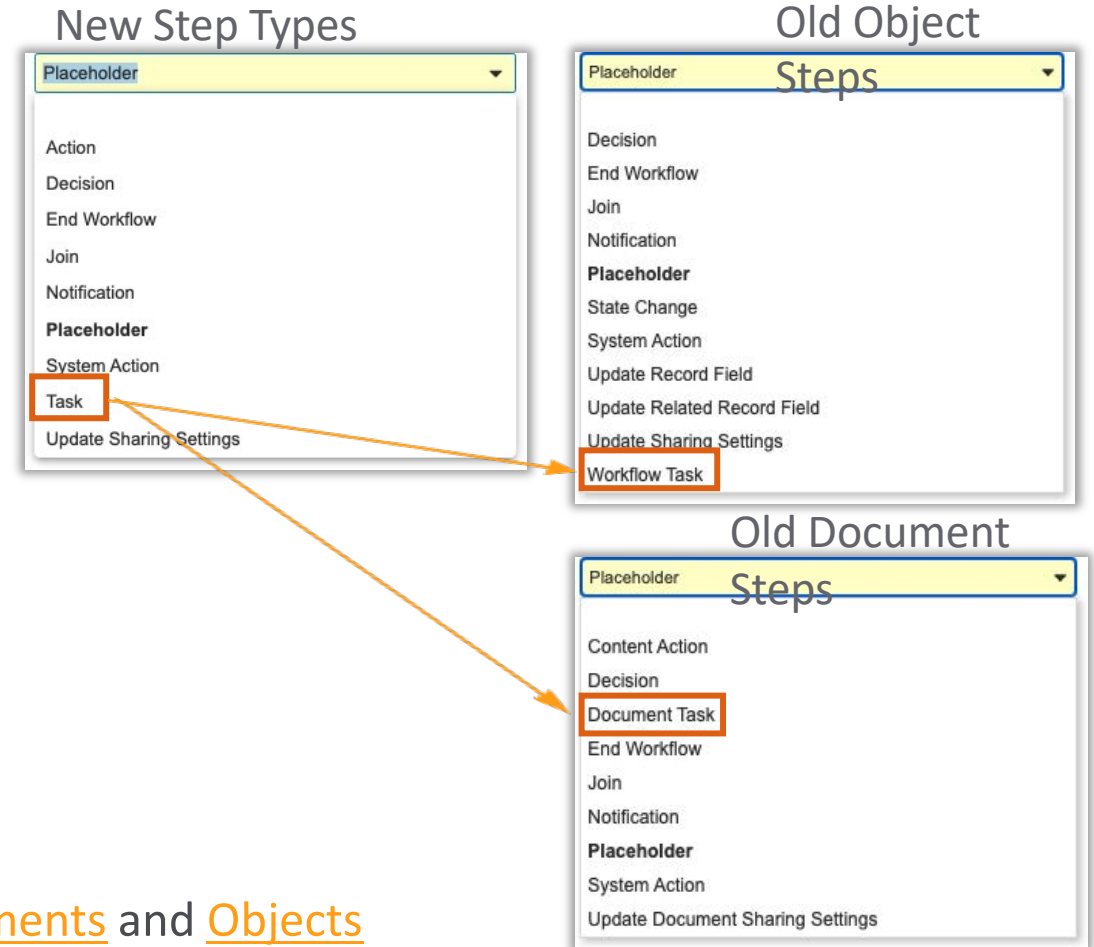
Name*

Type* **Task**

Description

Next Steps

Tags



- Considerations

- No changes are required to existing configurations
- Learn more about configuring workflows on [Documents](#) and [Objects](#)





Remove Default Task Link in Label

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

The screenshot shows the 'All Tasks' view in the Veeva system. The navigation bar at the top includes 'Tasks', 'Library', 'Claims and Reference', 'Reporting', 'Advanced', 'Portal', 'Users', '90 Day Expiration - Promotional', 'Admin Tools', and 'Envelope - MDW'. The left sidebar shows the user 'CSM User' and a 'VIEWS' section with 'All Tasks' (13), 'My Tasks' (12), and 'Available Tasks' (1). The main area displays a list of tasks. The second task, 'Committee Review Meeting', is highlighted with an orange box and a callout bubble that says 'Workflow Task Label with the default link removed'. The task details include a warning icon, the title, a due date of 2/22/2022, and a status of 'Available'.

- Considerations
 - Learn more about configuring [Document Workflows](#) and [Object Workflows](#)



Remove Default Task Link in Label

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

Workflows > Live Review Committee Meeting > Committee Review

Details

Label* Committee Review

Name* committee_review

Type* Task

Description You have been requested to participate in a Committee Review Meeting for these documents. Perform your review, then click the complete button for this task

Next Steps Join x

Tags

Task Options

General Settings

Task Label* Committee Review Meeting

Hide default link in task pages

Assign Task To* Review Committee Members

Assign to all users in participant group

Make available to users in participant group

Instructions* You have been requested to participate in a Committee Review Meeting for these documents. Perform your review, then click the complete button for this task

Task Requirement* Optional

Do not allow workflow owner to receive this task

Complete task without viewing the item

Display information about previous tasks



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

1 of 20 documents in this list

Closed

INFORMATION [Edit Fields](#)

- ▶ General
- ▶ File Info
- ▶ Product Information
- ▶ Applicability
- ▶ Status Dates
- ▶ Sharing Settings [+](#)
- ▶ Version History [See more details](#)
- ▶ Supporting Documents (0) [+](#)
- ▶ Signatures (1) [Signature Page](#)
 - Hirenmay Basu [5/10/2021 4:46 PM EDT](#) [Rejected](#)
- ▶ Renditions (1) [+](#)

1 of 20 documents in this list

Closed

INFORMATION [Edit Fields](#)

- ▶ General
- ▶ File Info
- ▶ Product Information
- ▶ Applicability
- ▶ Status Dates
- ▶ Sharing Settings [+](#)
- ▶ Version History [See more details](#)
- ▶ Supporting Documents (0) [+](#)
- ▶ Renditions (1) [+](#)

- Cancellation Action removes eSigs from the full workflow
- Content Action Steps in a workflow removes eSigs for specific tasks

- 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](#)





Remove eSignature from Documents

- Configuration

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

Workflows > Review Committee Meeting Edit ...

Details

Label Review Committee Meeting

Name review_committee_meeting__c

Document Lifecycle Any document lifecycle

Workflow Type Document

Version 10

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

Description use this workflow to review multi-documents during a PRC or MRC meeting

Workflow cancellation comment

Create Draft maintains current version

Cancellation Actions ? Edit

Cancel Save

Add the cancellation action 'Remove eSignatures from Documents'

Workflows > Review Committee Meeting > Cancellation Actions ? Cancel Save

Always Perform with conditions

perform actions

Remove eSignature from Documents ? x

+ Add Action



Remove eSignature from Documents

- Configuration

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

Workflows > Review Committee Meeting > Create Step

Cancel Save

Details

Label*

Name*

Type* **Content Action**

Description

Next Steps

Rules ?

Rule 1

Always Perform with conditions

perform actions

Remove eSignature from Documents

Task*

+ Add Action

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



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

Always Perform with conditions

perform actions

Update field

Fields*

Product

Set to value*

RecordByLabel("Cholecap")

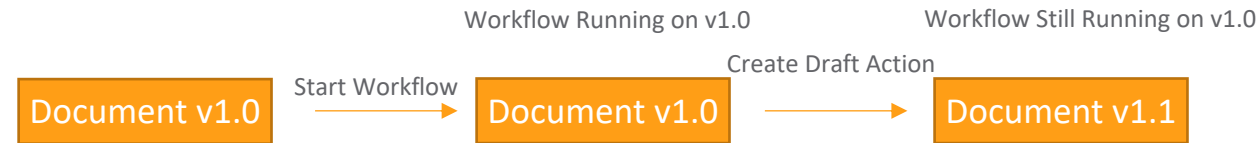


Bound Version Create Draft

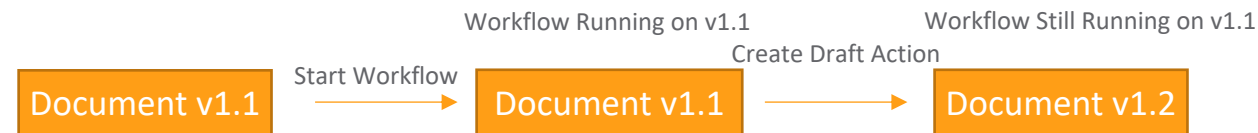
- This feature allows workflows to remain on the current version of a document when the Create Draft Action is performed

- Example scenarios

1. Workflow running on major version and create draft occurs

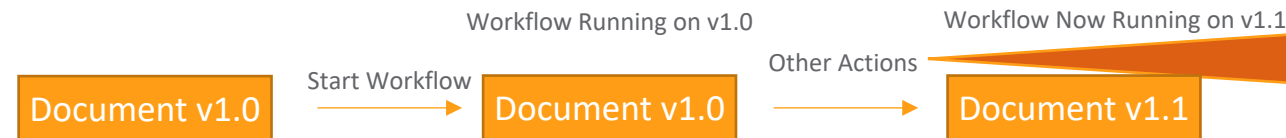


2. Workflow running on minor version and create draft occurs



- 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](#)





Bound Version Create Draft

- Configuration

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

The screenshot shows the Veeva Configuration interface for a workflow named "Live Review Committee Meeting". The left sidebar contains navigation menus for Components, Recently Used, and Favorites. The main content area displays the workflow details, including its label, name, document lifecycle, and version. At the bottom, there are three checkboxes: "Workflow cancellation comment", "Use workflow for single document", and "Create Draft maintains current version". The "Create Draft maintains current version" checkbox is highlighted with an orange callout box. Another orange callout box points to the "Create Draft maintains current version" checkbox, stating: "The Settings Flag is default OFF allowing customers to retain their current runtime behavior". A third orange callout box points to the "Create Draft maintains current version" checkbox, stating: "Select the checkbox to allow the Create Draft action to increment the document's minor version while the active workflow remains on the previous major document version".



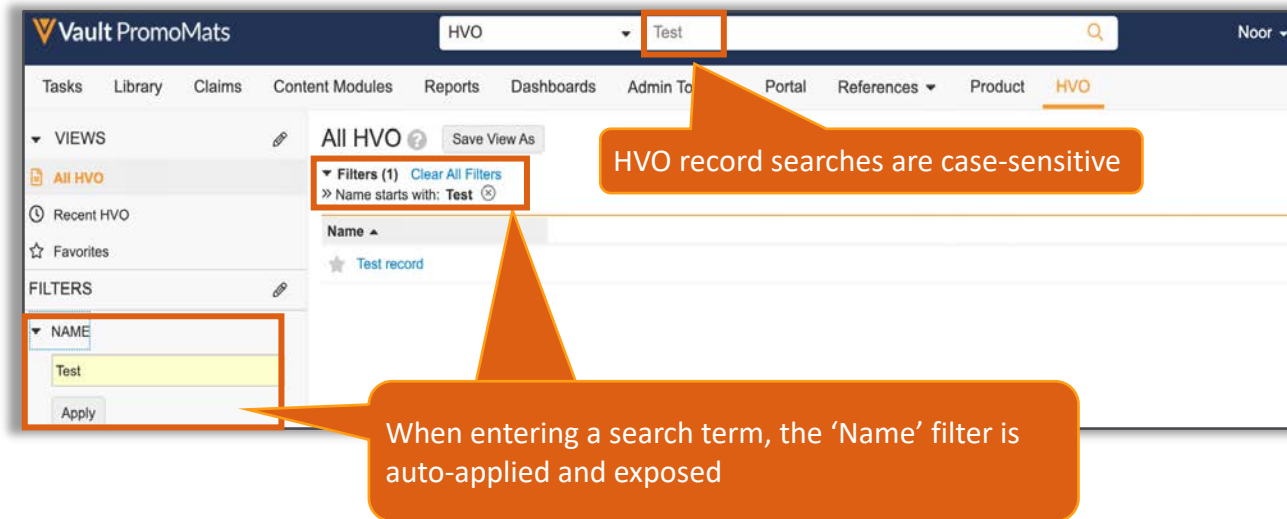


Searching & Filtering

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](#)





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

All Library Save View As

Filters (1) [Clear All Filters](#)

Search for: **social media**

A search for Social Media only returns documents where both terms are found in the same field

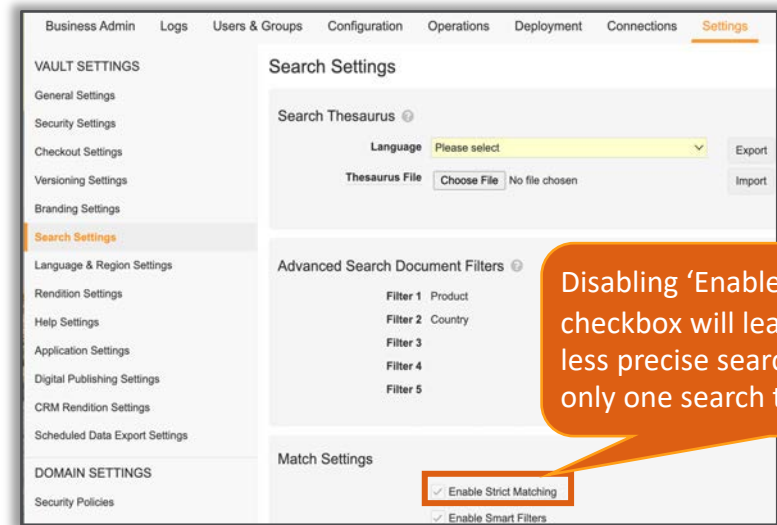
Name	Status	Product	Type	Subtype	Description
#CholesterolAwareness Twitter Campaign (v1.0)	Approved for Distribution	Cholecap	Material	Social Media	
Podcast Episode 1 (v0.1)	Draft	No Product	Material	Social Media	
Labrinone Live Life e-Detail Aid (v0.1)	Draft	Labrinone	Material	Healthcare Practitioner Resource	social media
152891 Natevba CLM_DR2 (v0.1)	Draft	Natevba	Material	Healthcare Practitioner Resource	social media



Field-Centric Strict Matching

- Considerations

- To access Strict Matching: Admin > Settings > Search Settings > Enable 'Strict Matching'



- Learn more about [Strict Matching](#)



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

	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			

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

Multidirectional & Phrase Synonyms



The Search result consists of documents that include entry words and corresponding synonyms as configured in the thesaurus

- Considerations

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



Multidirectional & Phrase Synonyms



- Configuration

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

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

VAULT SETTINGS

- General Settings
- Security Settings
- Checkout Settings
- Versioning Settings
- Branding Settings
- Search Settings**

Search Settings

Search Thesaurus ?

Language

Thesaurus File No file chosen

- 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](#)



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

The screenshot shows the 'Claims and Match Text Variations Results' page. At the top, there's a search bar with 'Claims and Match Text Variations: LDL' and an 'EXPAND SEARCH' button. Below the search bar, there's a table with columns: Name, Match Text, Category, Product, Country, Lifecycle, Claim, Instruction for Use, and Claim Restrictions. The table lists several records, including CL-000055, CL-000032, CL-000026, CL-000025, CL-000016, and CL-000007. A filter menu is open, showing 'Include Match Text Variation records related to results in the Claims section' with a checked box for 'Claims'.

Selecting the 'Include Related Record' filter will include direct and indirect hits

Includes Match Text Variation records related to results in the Claims section

MTV-000002
CholeCap (*) reduces elevated total cholesterol
MTV-000025
Cholecap Improves happiness even on cloudy days

Not selecting the 'Include Related Record' filter will include direct hits

Match Text Variations

Claims

Name	Match Text	Claim
MTV-000010	A (*) with diabetes who lowers (*) LDL cholesterol can reduce CV complications by 20-50(*)	CL-000026
MTV-000007	Cholecap is better than all competition in lowering LDL-C by 37.2% at 6 weeks	CL-000016
MTV-000008	Cholecap is so much better than all competition in lowering LDL-C by 37.2% at 6 weeks	CL-000016



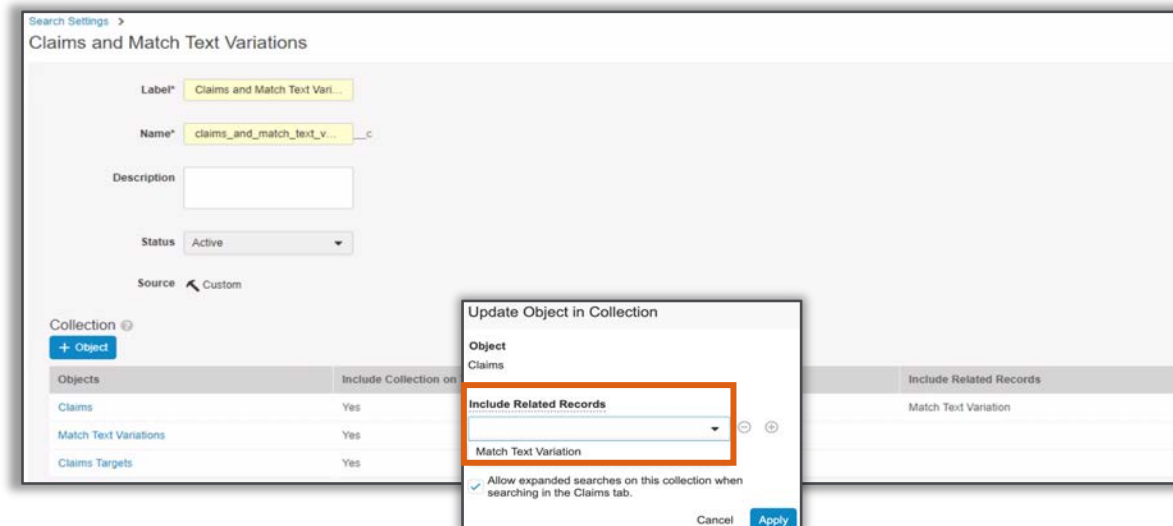
Expanded Search with Related Records

- 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](#)





Reporting



In Operator for Name Report Filters

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

The “In” operator allows users to select multiple values with an implicit OR between each value

Users can select the binocular icon to view record values before adding them to the filter

- Considerations

- User can select up to 100 name values in a single filter
- Learn more about [Using Report Filters](#)





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](#)

The screenshot displays the Vault PromoMats reporting interface. The top navigation bar includes the Vault logo, a 'Reports' dropdown, a search bar, and user information. The main content area shows the configuration for a report titled 'Monitor Checked-Out Documents'. The configuration is organized into sections: PROPERTIES (Report Type: Document), FORMULA FIELDS, CONDITIONAL FIELDS, and FILTERS. The FILTERS section is expanded, showing two filter rules: 'Checked Out' with the operator 'equals' and 'Checked Out Date' with the operator 'is in the range'. Below the filters, the 'Edit Columns' section is visible, showing a table with columns: Document Name, Document Number, Document Status, Created By, Checked Out, Checked Out By, Checked Out Date, and Description. The 'Checked Out', 'Checked Out By', 'Checked Out Date', and 'Description' columns are highlighted with a red box. The interface also includes buttons for 'Cancel', 'Run', and 'Save'.





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 Template export options appears if an Excel template is uploaded to the report

The Action menu will display a single Export to Excel option for Data Only, Formatted, and Template.

Users can download the full data or grouped summary of the report

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

Claims Library Report

PROPERTIES
Report Type Claim with Link Target and Match Text Variation

FILTERS (0)

Claim (46)								Link Target (92)			
Name	Match Text	Claim Count	Product	Country	Category	Claim Risk	Status	Name	Anchor Title	Anchor Id	Anchor Page
CL-000001	Now approved for the treatment of hypercholesterolaemia in teenagers and young adults with familial hypercholesterolaemia	1	Cholecap	United States	Clinical	Medium	Active	LT-000001 LT-000035 LT-000038 LT-000058	Cholecap reduces total-C, LDL-C, and apo B in patients 2x more patients LDL Reduction @-37-@12%	34 48 1	
CL-000002	Reduces risk of mortality in patients with CRC	1	Cholecap	United States			Active				

Claims Library Report - Protected View

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

Claim (46)								Link Target (92)					
Name	Match Text	Claim Count	Product	Country	Category	Claim Risk	Status	Name	Anchor Title	Anchor Id	Anchor Page	Reference	Reference Type
CL-000001	Now approved for the treatment of hypercholesterolaemia in teenagers and young adults with familial hypercholesterolaemia	1	Cholecap	United States	Clinical	Medium	Active	LT-000001	Cholecap reduces total-C, LDL-C, and apo B in patients	34		1 1573849741904	Anchor
								LT-000035	2x more patients	48		1 157418989259	Anchor
								LT-000058	LDL Reduction @-37-@12%	1		2 1472489981949	Anchor
CL-000002	Reduces risk of mortality in patients with CRC	1	Cholecap	United States			Active						



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](#)



Optional Prompts

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

Select the 'Prompt' and 'Optional' report filter checkboxes when creating or editing a report

At report run-time, users can select the 'Skip' checkbox to skip the filter prompt

- Considerations

- Report runtimes can significantly increase when skipping object filters with a large number of records
- Learn more about [Using Report Filters](#)





Multi-Pass Formula Fields Enhancements

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

★ Workflow with Document and User ✎

▼ PROPERTIES

Report Type Workflow with Document and User
Advanced Options Multi-Pass

▼ FORMULA FIELDS

Label	Report View	Return Type	Formula Expression
Creation to Effective Date	Workflow with Document	Number	workflow_with_document__c.documents.effective_date__

+ Create Formula Field



Before 22R1

Create Formula Field for [Workflows with Document and User] ⓘ

Report View: User

Label: User

Formula Expression: created date

As of 2021

Create Formula Field for [Workflow with Document and User] ⓘ

Report View: Workflow with Document

Label: User

Formula Expression: created date

- Learn more about [Multi-Pass Reporting](#)





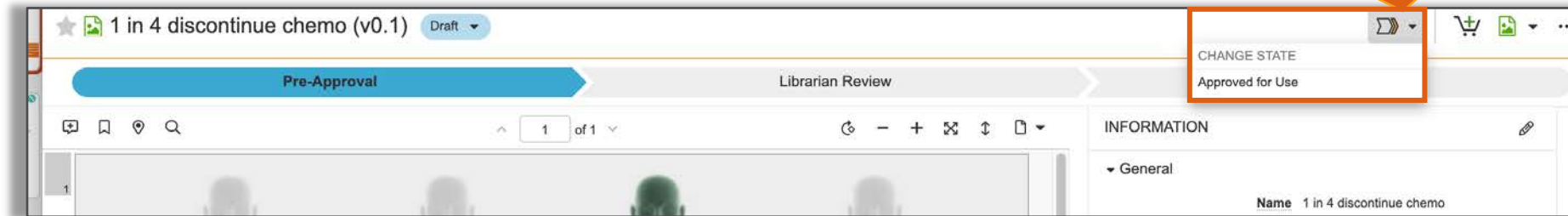
Usability & Interface

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

Drop-down displays even when one state change or workflow action is available upon selecting the Chevron icon



- Learn more about the [Chevron Icon](#)



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

Lifecycle State In Review

Country Global

Approval Document Content Module - CM-000001 (v0.5)

Usage Guidelines Fair balance rules are important for this rollout and we do not expect any new assets to be created by agencies. Contact ops if a hard requirement for a new asset is to be requested. Costing to be to local team as no funds are allocated to additional assets. [Show more](#)

Usage Guidelines

Fair balance rules are important for this rollout and we do not expect any new assets to be created by agencies. Contact ops if a hard requirement for a new asset is to be requested. Costing to be to local team as no funds are allocated to additional assets.

Close

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

Lifecycle State In Review

Country Global

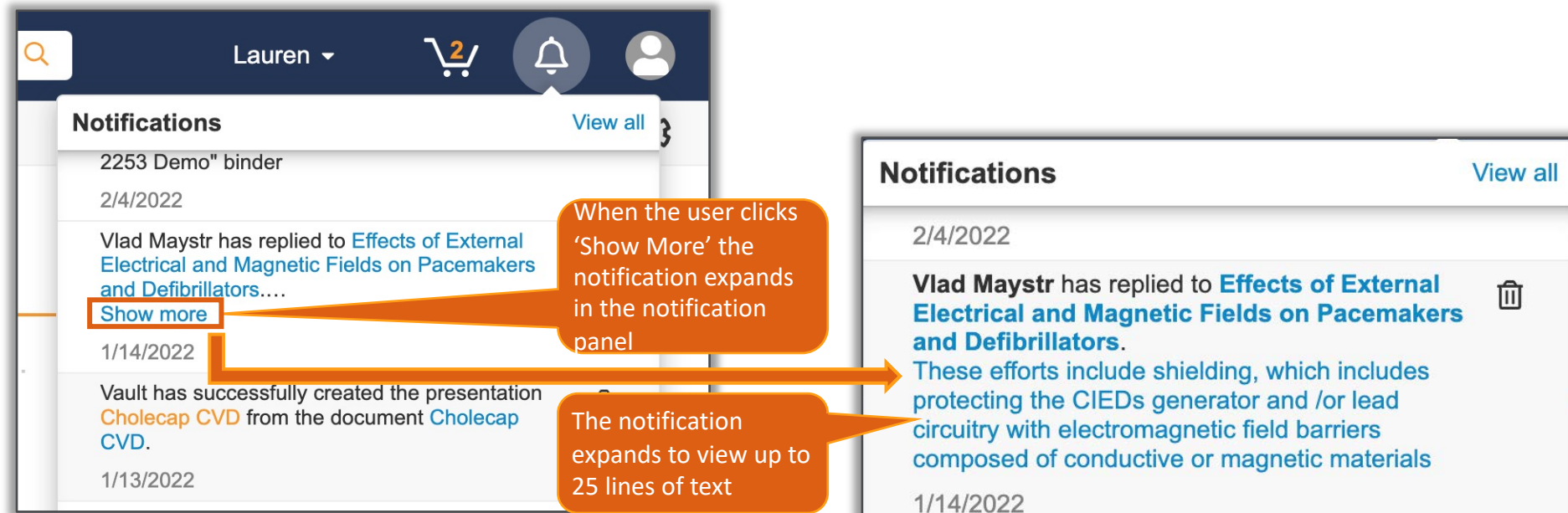
Approval Document Content Module - CM-000001 (v0.5)

Usage Guidelines Fair balance rules are important for this rollout and we do not expect any new assets to be created by agencies. Contact ops if a hard requirement for a new asset is to be requested. Costing to be to local team as no funds are allocated to additional assets.



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

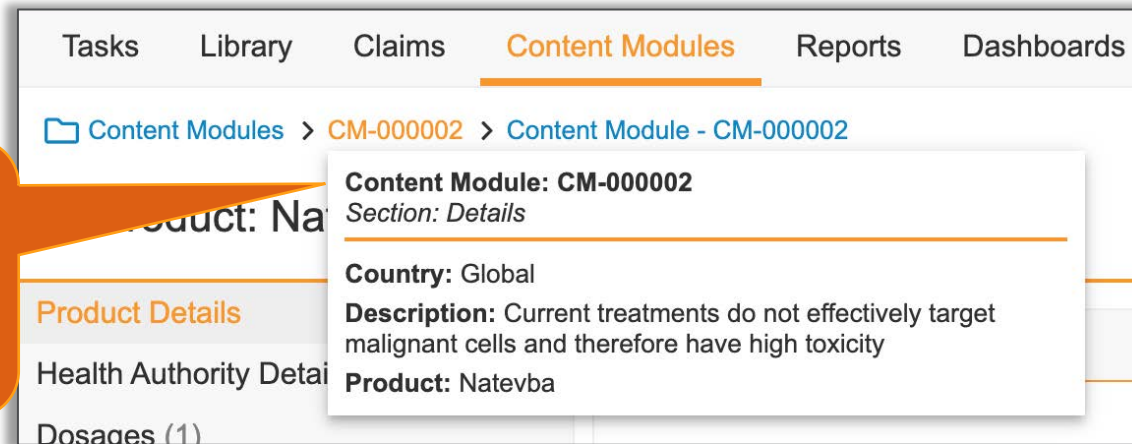
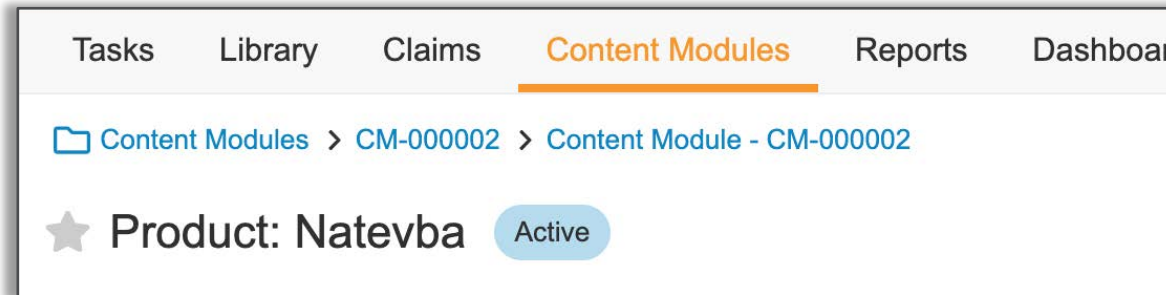


- Considerations
 - If the notification is over 25 lines of text then the notification will include a hyperlink to navigate directly to the full text on the notification page
 - Learn more about [Notifications](#)

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



Users can mouseover the breadcrumb to display a hovercard that identifies the previously viewed record before navigating back to that page

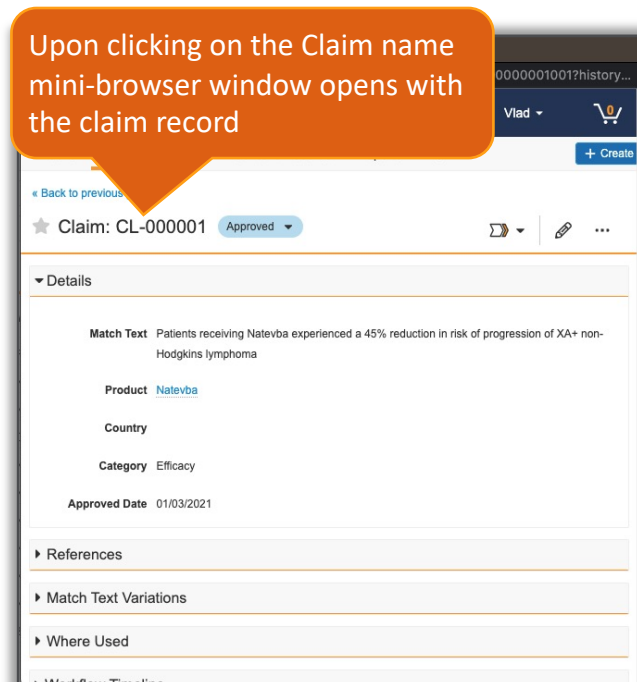
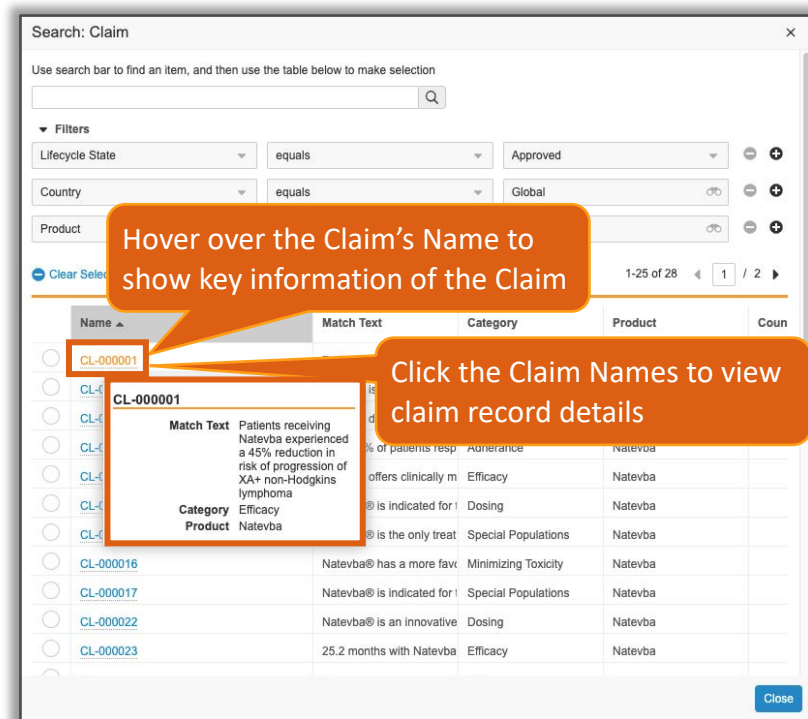


Auto Claims Linking

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](#)





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

★ Claim: CL-000024 Approved

▼ Details

Match Text Over 2 years median PFS*

Prior to 22R1, Claim *Match Text* and *Match Text Variation* field values required an attached wild card {*} to account for superscripts within the material content

★ Claim: CL-000024 Approved

▼ Details

Match Text Over 2 years median PFS

As of 22R1, Claim *Match Text* and *Match Text Variation* field values no longer require an attached wild card {*} to account for superscripts within the material content

Precision targeting delivers exceptional results

Over 2 years median PFS²

- 25.2 months with Natevba[®] vs 14.0 months with chemotherapy
- 45% reduction in risk of progression

Over 2 years median PFS²

Vincent 2020 Final (v1.0)
From CL-000024
less than 2 days ago (v1.0)

The use of wild cards {*} in the *Match Text* or *Match Text Variation* field value produced a *Suggested Link* when running the *Suggest Link Action*

Precision targeting delivers exceptional results

Over 2 years median PFS²

- 25.2 months with Natevba[®] vs 14.0 months with chemotherapy
- 45% reduction in risk of progression

Over 2 years median PFS²

Vincent 2020 Final (v1.0)
From CL-000024
Vlad Maystr seconds ago (v1.0)

Precision targeting ensures minimal risk

Natevba PI Revised 01/2021 (v2.0)

Running the *Suggest Link Action* will now produce an Auto Link indicating there is an exact match between the Claim Match Text and the material content

– Learn more about [Configuring Auto Claims Linking](#)





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”)

22R1 Workdays & Holiday expressions - Example

Report Highlights: Total Days to Approve, Days to Approve (No Weekends), Days to Approve (No Weekends / Holidays)

PROPERTIES
Report Type: Document

FORMULA FIELDS

Label	Object	Return Type	Formula Expression
Time between Doc. Creation and AFD	Document	Number	documents approved_for_distribution_date__c - documents document_creation_date__v
Time between AFP and AFD	Document	Number	documents approved_for_distribution_date__c - documents approved_for_production_date__c
Current Version Days to AFD (Calendar)	Document	Number	documents approved_for_distribution_date__v - documents version_creation_date__v
Version Days to AFD (No Weekends)	Document	Number	NetWorkdays(documents version_creation_date__v, documents approved_for_distribution_date__c, 1)
Version Days to AFD (No Holiday)	Document	Number	NetWorkdays(documents version_creation_date__v, documents approved_for_distribution_date__c, 1, "United States")

CONDITIONAL FIELDS

FILTERS

Approved for Distribution Date is not blank

Document > Time between Doc Creation and AFD is greater than 1

Document Name	Document Number	Document Status	Version Creation Date	Approved for Distribution Date	Current Version Days to AFD (Calendar)	Version Days to AFD (No Weekends)	Version Days to AFD (No Holiday)
Cholecap When Diet and Exercise Are Not Enough (v1.0)	PP-CC-ALL-0004	Expired	8/26/2016 4:07 PM EDT	9/12/2017	382.0	273	262
Cholecap MOA video (v0.1)	PP-CC-ALL-0015	Approved for Distribution	8/26/2016 4:07 PM EDT	5/6/2020	1,349.0	964	926
Physician Testimony (v1.0)	PP-CC-ALL-0019	Expired	8/26/2016 4:07 PM EDT	9/12/2017	382.0	273	262
Raxipen Intro (v1.0)	PP-VP-JP-0002	Expired	8/26/2016 4:27 PM EDT	10/6/2016	41.0	30	29
Raxipen Pen (v1.0)	PP-VP-JP-0003	Expired	8/26/2016 4:27 PM EDT	10/6/2016	41.0	30	29
Raxipen Survey (v1.0)	PP-VP-JP-0004	Expired	8/26/2016 4:27 PM EDT	10/6/2016	41.0	30	29
VeevaProm XP - Booth Video Anatomy of the Brain (v1.0)	PP-VPX-ALL-0006	Expired	8/30/2016 2:19 PM EDT	9/12/2017	378.0	271	260
VeevaProm HCP Presentation Rise Above (v1.0)	PP-VPX-ALL-0007	Expired	8/26/2016 5:07 PM EDT	9/12/2017	382.0	273	262
Seizures in Canines (v1.0)	PP-VPX-ALL-0016	Withdrawn	8/26/2016 5:07 PM EDT	8/31/2016	5.0	4	4
VeevaProm HCP Indica	PP-VP-ALL-0003	Expired	8/29/2016 11:09 AM EDT	9/12/2017	379.0	272	261

Group rows by: Select Field

Add field to group by (optional)





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



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

Parent Claim Number [CL-000001](#)

Parent Claim Match Text Patients receiving Natevba experienced a 45% reduction in risk of progression of XA+ non-Hodgkins lymphoma today

Source value of a lookup field "Parent Claim Match Text" has been updated in this example

Audit trail for Claim : Claim: CL-000070

Include related objects
 Link Target X
 Match Text Variations X

Timestamp all

+ Add filter Apply

Showing events for 28/09/2021 to 25/02/2022 (4 results)

Timestamp (dd/MM/yyyy)	User Name	Event Description	Record
25/02/2022 10:18 EST	System	"Parent Claim Match Text" changed from "Patients receiving Natevba experienced a 45% reduction in risk of progression of XA+ non-Hodgkins lymphoma" to "Patients receiving Natevba experienced a 45% reduction in risk of progression of XA+ non-Hodgkins lymphoma today"	Claim : CL-000070
23/02/2022 16:14 EST	csmus@sc20.com	Claim : CL-000070 copied hierarchy from Claim : CL-000001 (V1W000000001001)	Claim : CL-000070

	A	B	C	D	E	F	G	H
1	Timestamp	User Name	Full Name	Item	Action	Field Name	Old Value	New Value
2	25/02/2022	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	23/02/2022	csmus@sc	Orville Mil	Claim : CL-000070	DeepCopy		Claim : CL-000001	
4	23/02/2022	csmus@sc	Orville Mil	Claim > Claim Targe	Copy			
5	23/02/2022	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

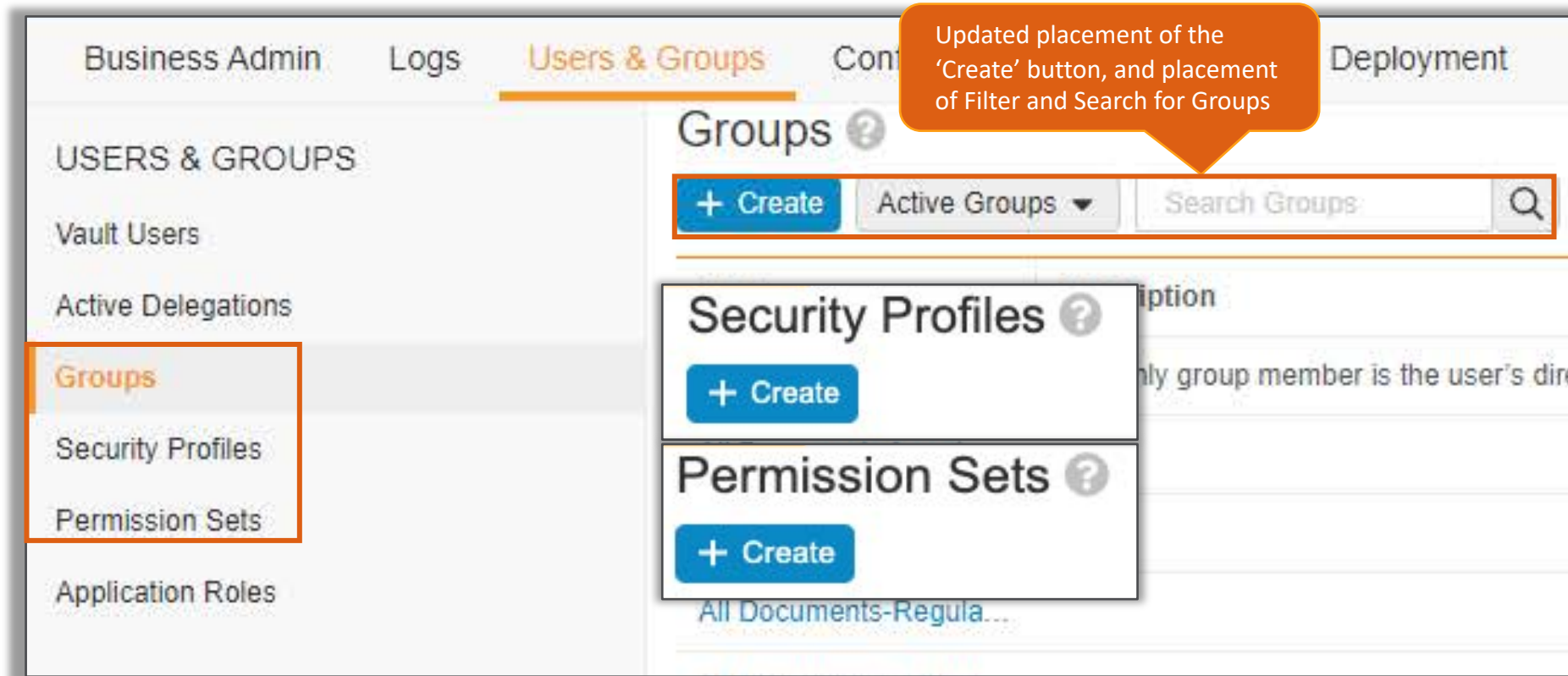
- Learn more about [Lookup Fields](#)





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



Jobs: Display Start Time for Completed Jobs



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

The screenshot shows the Vault PromoMats interface. The 'Operations' tab is active, and the 'Job Status' page is displayed. The 'Scheduled' section shows a table with columns: Job ID, Job Title, Scheduled Start Time, and Job Status. The 'History' section shows a table with columns: Job ID, Job Title, Started Time, Completion Time, Job Status, and Log Expiration Date. The 'Started Time' column in the History table is highlighted with a red box. An orange callout bubble points to this column with the text: 'Started Time' column is now included in the History section.

Job ID	Job Title	Scheduled Start Time	Job Status
116845	Synchronize Portal Assets	12/01/2022 07:00 EET	Scheduled
116850	Vault CDN Usage Extraction	12/01/2022 09:00 EET	Scheduled
116851	User Account Activation	12/01/2022 10:00 EET	Scheduled
116852	Task Reminder Notification	12/01/2022 11:00 EET	Scheduled

Job ID	Job Title	Started Time	Completion Time	Job Status	Log Expiration Date
116933	Task Reminder Notification	11/01/2022 11:00 EET	11/01/2022 11:01 EET	Success	
116932	User Account Activation	11/01/2022 10:02 EET	11/01/2022 10:03 EET	Success	
116927	Vault CDN Usage Extraction	11/01/2022 09:01 EET	11/01/2022 09:02 EET	Errors Encountered	
116861	Vault Comparison of Vlad (95249...	11/01/2022 13:04 EET	11/01/2022 13:04 EET	Success	27/01/2022 13:04 EET

- Learn more about [Managing Jobs & Viewing Jobs Status](#)





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

The screenshot shows the cover page of the 'Vault Configuration Report' workbook. It features the Veeva Vault logo at the top left. Below the logo, the title 'VAULT CONFIGURATION REPORT' is displayed in red. A table of configuration details is shown, including fields like 'Generated by', 'Generated on', 'Vault ID', 'Vault', 'Vault Version', 'Domain Type', and various 'Include' and 'Suppress' options. The bottom navigation bar includes 'Cover Page', 'Table of Contents', 'Vault Settings', 'Doctype', and 'Documents & Binder'.

VAULT CONFIGURATION REPORT	
Generated by	John Appleseed
Generated on	07/01/2022 17:31 EET
Vault ID	95249
Vault	Production
Vault Version	21.3.2
Domain Type	Demo
Include Vault Settings	True
Include Documents & Binder Templates	True
Include Inactive Components	False
Suppress Empty Results	False
Include Components Modified Since	N/A

Vault Configuration Report Object Data workbook

The screenshot shows the cover page of the 'Vault Configuration Report Object Data' workbook. It features the Veeva Vault logo at the top left. Below the logo, the title 'VAULT CONFIGURATION REPORT - OBJECT DATA' is displayed in red, with 'OBJECT DATA' highlighted in a red box. A table of configuration details is shown, including fields like 'Generated by', 'Generated on', 'Vault ID', 'Vault', 'Vault Version', 'Domain Type', and 'Suppress Empty Results'. The bottom navigation bar includes 'Cover Page', 'Table of Contents', 'Application', 'ApplicationRole', and 'Connection'.

VAULT CONFIGURATION REPORT - OBJECT DATA	
Generated by	John Appleseed
Generated on	07/01/2022 18:15 EET
Vault ID	95249
Vault	Production
Vault Version	21.3.2
Domain Type	Demo
Suppress Empty Results	False

- Learn more about [Configuration Reports](#)

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
```

Objectlifecyclestateentryaction Name	rule	order
state_sys.entryaction3__c	<?xml version="1.0" encoding="UTF-8"?><rule><actions><action type="platform.all.updateRecordAction"><targetField>Object.annotation_keywords_sys.approved_date__c</targetField><expression>today()</expression><updateType>formula_builder</updateType></action></actions></rule>	
state_sys.entryaction5__c	<?xml version="1.0" encoding="UTF-8"?><rule><actions><action type="LIFECYCLE_NOTIFICATION_ENTRY_ACTION" notificationTemplateKey="Notificationtemplate.claim_state_change_notification__c"><notificationRoleIds>owner__v</notificationRoleIds></action></actions></rule>	
state_sys.entryaction4__c	<?xml version="1.0" encoding="UTF-8"?><rule><actions><action type="platform.all.updateRecordAction"><targetField>Object.annotation_keywords_sys.withdrawn_date__c</targetField><expression>Today()</expression><updateType>formula_builder</updateType></action></actions></rule>	
state_c.entryaction2__c	<?xml version="1.0" encoding="UTF-8"?><rule><actions><action type="objectLifecycleEntryAction.all.relatedDocsStateChange"><destinationDocumentStateCategory>base:general:steady</destinationDocumentStateCategory></action><action type="LIFECYCLE_NOTIFICATION_ENTRY_ACTION" notificationTemplateKey="Notificationtemplate.record_state_change_notification__c"><notificationRoleIds>owner__v,editor__v</notificationRoleIds></action></actions></rule>	
state_v.entryaction__c	<?xml version="1.0" encoding="UTF-8"?><rule><actions><action type="objectLifecycleEntryAction.all.relatedDocsStateChange"><destinationDocumentStateCategory>base:general:starting</destinationDocumentStateCategory></action></actions></rule>	

- Learn more about [Lifecycle State Entry Actions](#)



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)

The screenshot shows the 'Vault Configuration Report' interface. On the left, there is a navigation menu with 'ENVIRONMENT', 'MIGRATION', and 'Vault Configuration Report' selected. The main area displays 'Component Types' with a list of 'Included Component Types'. The 'Tag' component is highlighted with a red box. An orange callout bubble points to the 'Tag' entry with the text: 'Tag is now visible on the component types list'.

	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, Dos	✓		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, Doct	✓		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
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							

• Considerations

- This feature is applicable only to Vaults with Outbound and Inbound Packages enabled
- Learn more about [Tags](#)
- Learn more about [Configuration Reports](#)



Configuration Management: Migrating Document Tags between Vaults



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



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

From the Actions menu, select Review & Deploy to compare the Inbound Package to the current configuration

Review the Deployment Status and Deployment Action for each item.

Step	Step Type	Label	Name	Type	Deployment Status	Deployment Action
00010	Component	Activity Detail Page Layout	activity_detail_page_layout__c	Pagelayout	Verified	Update (Different in target Vault)

XML Strings can now be viewed directly as part of review process of the inbound package

Operation	Item	From Target Vault	To
Change	page_markup	<vault:page xmlns:vault="VeevaVault" controller="ObjectType.activity__v.base__v"><vault:section title="Details" name="details__c"><vault:detailform type="One-Column"><vault:field reference="name__v" /><vault:field reference="status__v" /><vault:field reference="assigned_to__v" /><vault:field reference="due_date__v" /></vault:detailform></vault:section></vault:page>	<vault:page xmlns:vault="VeevaVault" controller="ObjectType.activity__v.base__v"><vault:section title="Details" name="details__c"><vault:detailform type="One-Column"><vault:field reference="name__v" /><vault:field reference="status__v" /><vault:field reference="assigned_to__v" /><vault:field reference="due_date__v" /></vault:detailform></vault:section></vault:page>

- Considerations
 - Auto-on in Vaults with Outbound and Inbound Packages enabled
 - Learn more about [Configuration Migration Packages](#)





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

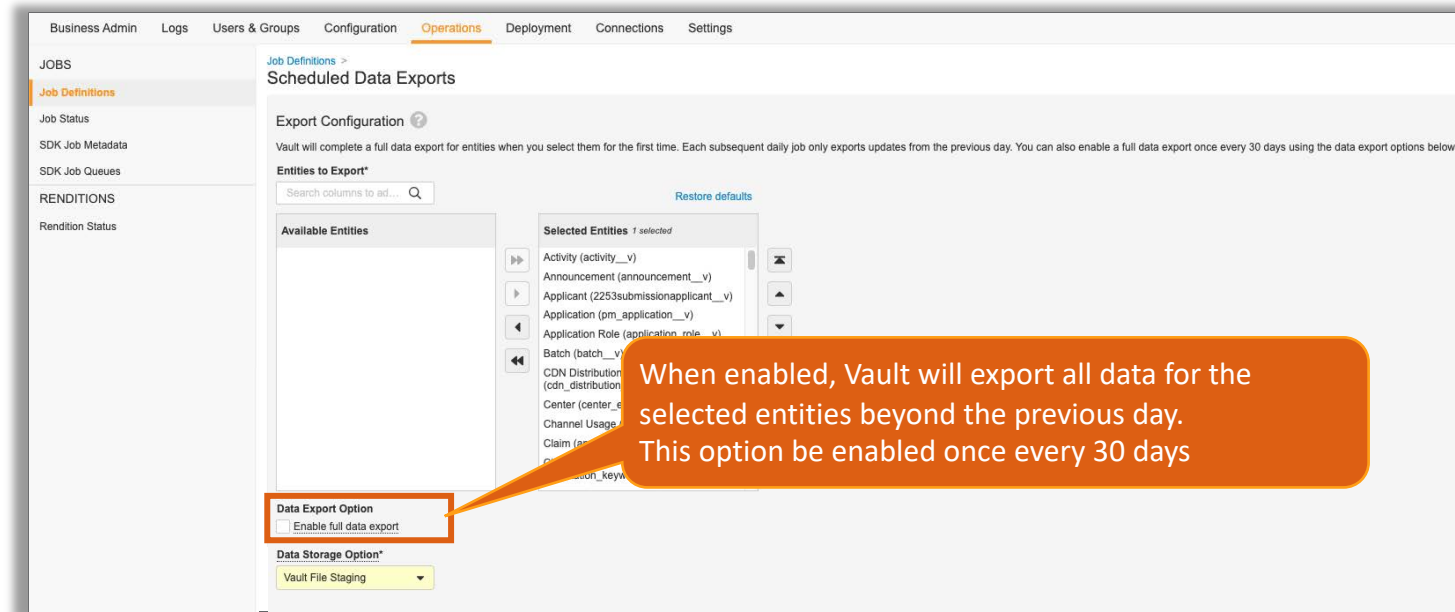
Vault Value	Pre-22R1 export	22R1 export
UK, Ireland	UK,,Ireland	""UK, Ireland""
Consumer \ Patient	Consumer \\ Patient	Consumer \ Patient

- 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](#)



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](#)



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](#)



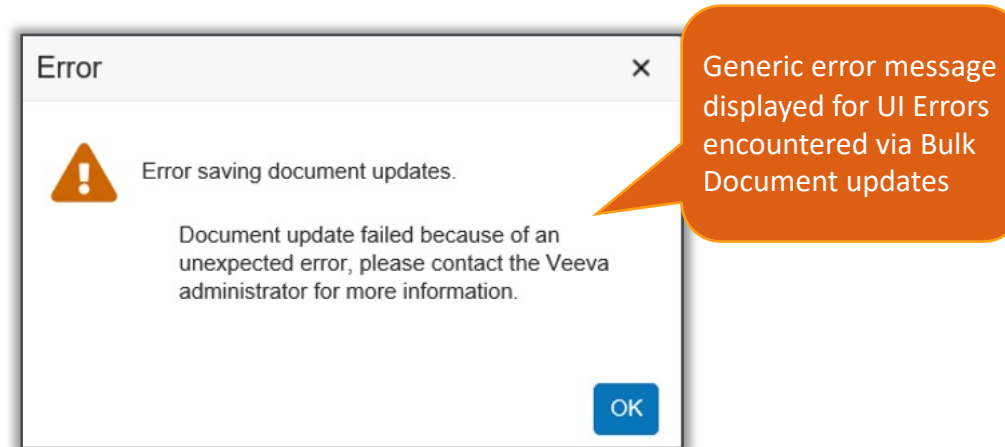
Significant Figures in Expressions

- 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](#)

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](#)



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

Always Perform with conditions

perform actions

Update field

Fields*

Product

Set to value*

RecordByLabel("Cholecap")

Edit Formula of Product

Fields | Functions | Operators | Products

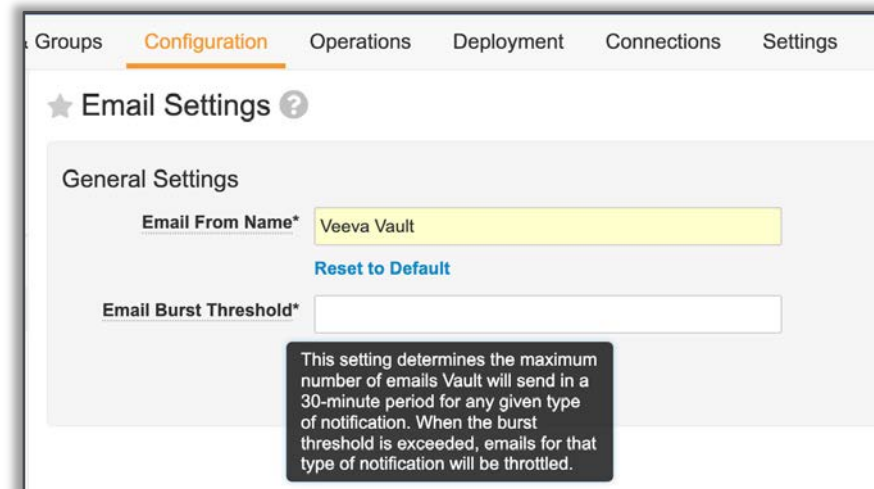
Search Products

RecordByLabel("Cholecap")



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





Vault Loader

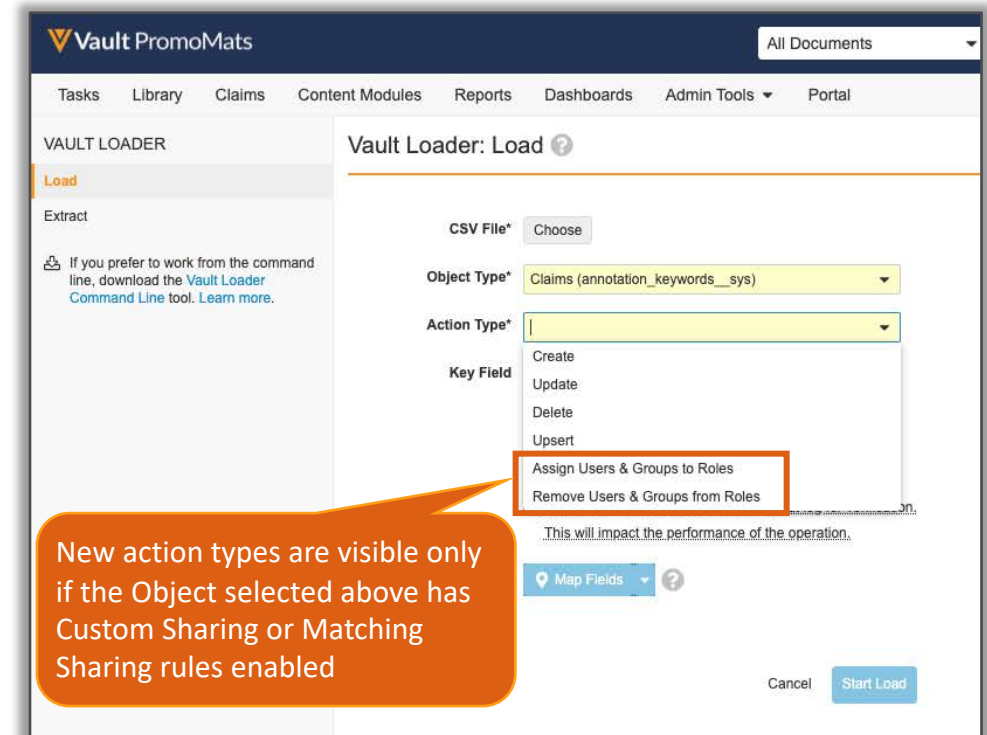
Vault Loader: Updating User & Group Role Assignments on Object Records



- 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](#)



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

Vault PromoMats

All Documents Search documents

Business Admin Logs Users & Groups Configuration Operations Deployment Connections Settings

VAULT SETTINGS

General Settings

Security Settings

Checkout Settings

Versioning Settings

Branding Settings

Search Settings

Language & Region Settings

Rendition Settings

Help Settings

Security Settings ?

Auto Managed Group Field Order ?

User Role Setup

- Country (country__c)
- Product (product__c)
- Document Type Group (document_type_group__c)

Portal User Role Setup

- Country (country__c)
- Product (product__c)
- Document Type Group (document_type_group__c)

'User Role Setup' and 'Portal User Role Setup' each get a separate row in the Configuration Report

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			Enable Upload New Version	Not Authorized
Versioning Settings	Versioning Settings				True

- Learn more about [Auto Managed Groups](#)



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](#)



Vault Loader: Log Skipped Lines in Failure Log

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

Veeva Vault

Your Loader Job has completed

Details:

- CSV File: [95249_119003_EXPORT-USERS_SUCCESS.CSV](#)
- Action Type: Update
- Object Type: Users
- Record Migration Mode: N/A
- Document Migration Mode: N/A
- Load Start Time: 22/02/2022 14:24 EET
- Duration: 0 hrs, 0 mins, 1 secs (9 records per second)
- 0 successes
- **9 failures**

This message is automatically generated by Veeva Vault and sent from the Vlad vault [sc20-vlad.veevavault.com](#). If this message was sent incorrectly, please contact your Vault administrators. To ensure delivery to your inbox, please add vault-emails@veeva.com to your address book.

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	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			

CSV lines that resulted in errors are included in failure logs

- Learn more about [Updating Object Record Roles with Vault Loader](#)



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

Vault Loader: Extract ?

Object Type* Envelope

DOCUMENTS

DOCUMENTS

OBJECTS

Where Clause Envelope Contents (envelope_content_sys)

Envelopes (envelope_sys)

Need help with Query Syntax & Structure?

Validate

Cancel Extract

Starting 22R1

Vault Loader: Extract ?

Object Type* Envelope

DOCUMENTS

No matches found.

Only Extract Column Headers

Where Clause

Need help with Query Syntax & Structure?

Validate

Cancel Extract

- Learn more about [Creating, Editing and Deleting Object Records using Vault Loader](#)
- Learn more about [Envelope and Envelope Content Object Record Access](#)



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

The screenshot shows the Vault interface with a document titled "Raxxipen Claims Document (v0.1)". A dialog box titled "Large File Download" is displayed, indicating that a 72.4 GB file has been selected and suggesting that it should be downloaded to Vault File Manager for a better experience. The dialog includes a "Download to Vault File Manager" button. A callout bubble points to this button, stating: "New 'Download to Vault File Manager' option available when initiating download of large size rendition files".

Another callout bubble points to the document's download menu, stating: "Vault provides this suggestion when applicable users attempt to download a rendition file larger than 4GB".

The Vault File Manager interface is also shown, with a "Download (4)" button highlighted. A callout bubble points to this button, stating: "Downloaded large rendition files are stored in the New 'Downloads' tab in VFM".

The Vault File Manager interface displays a table of downloaded files:

Name	Ext	Number	Version	Type	Size	Status	Downloaded	Updated
Cholecap Safety Information (PI)	docx	VV-QUAL-00004	v0.8	Source File	26.9 KB	Downloading 98%	18 Feb 2021	18 Feb 2021
Raxxipen Presentation - CLM	mkv	VV-QUAL-00003	v0.1	Rendition: Large Size Asset	72.4 GB	Downloading 31%	18 Feb 2021	18 Feb 2021

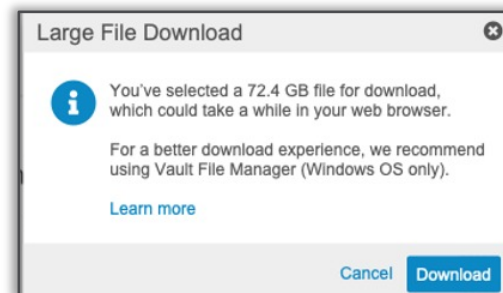


Download Rendition Files to Vault File Manager (VFM)



- 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](#)

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

Sort files by the order they will be processed for download or upload

Name	Ext	Number	Version	Type	Size	Status	Downloaded
22video	mov	asset-00201	v7.0	Rendition: Large Size Asset	11.35 MB	Paused	16 Feb 2022

Click on in progress files to pause and resume downloads and uploads

Open Document in Vault

Resume

Cancel

Cancel and Remove

- Learn more about [Vault File Manager for Windows](#)



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

The screenshot displays a document titled "Content Module - CM-000009 (v0.1)" in a "Draft" state. It features a navigation bar with icons for search, bookmark, and location, and a page indicator showing "2 of 2". The main content is divided into two sections:

Content Module Text Elements

Name	ASSET-000035
Label	Primary
Must Use	False
Text Element Type	Headline
Text Element Content	45% reduction in risk of progression

Content Module Rulesets

Name	ASSET-000036
Label	Image Instructions
Must Use	True
Ruleset	CMRS-000002
Ruleset Summary	Cholecap graphic must be used with 4x4 ratio

- Learn more about [Creating & Approving Content Modules](#)

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](#)



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

User Action is configured to issue a notification to Based On document owners

Notification sent to Based On document owners

Veeva Vault

Vlad Maystr,

Vault: CSM
Document Number: GL-CH-2100042
Document Name: [Brochure](#)
Child Document Name: [Brochure ES](#)
Child Document Number: ES-CH-2100008

GL-CH-2100042 [Brochure](#) is now Approved for Distribution.

Your document [Brochure ES](#) - ES-CH-2100008 is based on GL-CH-2100042 which has now entered in a new state.

Please take the appropriate action on your document based on this change.

Access your Vault here: [CSM](#)

This message is automatically generated by Veeva Vault and sent from the CSM vault [sc20-csm.veevavault.com](#). If you think it was sent incorrectly, please contact your Vault administrators. To ensure delivery to your inbox, please add vault-emails@veeva.com to your address book.

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– Learn more about [Parent Document Notifications](#)



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

Document Lifecycles > Material > States > Expired

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

Entry Actions

Always Perform with conditions

perform actions

Send Notification to Based On Content

+ Add Action

Document Lifecycles > Material > States > Approved for Distribution

Details | **User Actions**

User Actions

Rule 1

Always Perform with conditions

Allow the following actions

Send Notification to Based On Content

Action Label*

Notify "Based On" documents

+ Add Action



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

Rendition Type >
Print Rendition ?

Details

Rendition Type

name print_rendition_c

Automated Image Rendition

Format

Resize

Quality

Color Space

Density

Resample

Preserve Transparency

Preserves transparency when available

Compatible with .PNG, .GIF, .BMP, and .TIFF file formats on each Rendition Type

Enable to maintain transparent backgrounds from source files



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](#)

Automated-Image Rendition: Include Source Document Name



- Configuration

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

Rendition Type >
Black and White Rendition ?

Details

Rendition Type Black and White Rendition

name black_and_white_rendition__c

Automated Image Rendition

Format JPEG ▾

Resize

Quality

Color Space Gray ▾

Density

Resample

Preserve Transparency

Include Document Name

Renditions created will be named
[document name] - [rendition].[format
extension]



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](#)



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

All Cases Save View As

Name	SLA Status	Lifecycle State	Case Contact	Created Date	Target Close Date	Res Dat
★ CASE-000024	🚩	New	Thomas Hun	15/02/2022	16/02/2022	
★ CASE-000023	🚩	New	Tommy Hun	15/02/2022	16/02/2022	
★ CASE-000022	🟢	New	Jose Macarther	15/02/2022	22/02/2022	Low
★ CASE-000021	🚩	New	Jose Macarther	15/02/2022	16/02/2022	High
★ CASE-000020	🚩	New	Jose Macarther	15/02/2022	16/02/2022	High

1) Duplicate Case Contacts exist in MedComms before the CRM account merger

Merge My Accounts

Step 1. Select the records to merge

2) Duplicate CRM account records are merged

Please select up to three records that you wish to merge into one.

Hun

Tommy Hun account record is deprecated

<input checked="" type="checkbox"/>		Tommy Hun
<input checked="" type="checkbox"/>		Thomas Hun
<input type="checkbox"/>		McCannon

Thomas Hun becomes the CRM Master account record

★ Merged Contact: MERGED-000004 Active

Details

▼ Details

Name MERGED-000004

Status Active

Created By System

Created Date 15/02/2022 12:25 GMT

Last Modified By System

Last Modified Date 15/02/2022 12:25 GMT

Merged Into Contact [Thomas Hun](#)

Original Contact [Tommy Hun](#)

3) After the CRM account merger and data sync, in MedComms a Merged Contact record is generated

All Cases Save View As

Name	SLA Status	Lifecycle State	Case Contact	Case Priority	Created Date	Target Close	Res Dat
★ CASE-000024	🚩	New	Thomas Hun				
★ CASE-000023	🚩	New	Thomas Hun				
★ CASE-000022	🟢	New	Jose Macarther				
★ CASE-000021	🚩	New	Jose Macarther	High	15/02/2022	16/02/2022	
★ CASE-000020	🚩	New	Jose Macarther	High	15/02/2022	16/02/2022	

4) The MedComms Case Contact records are updated to the CRM Master account record value



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'

A screenshot of the 'Medical Inquiry' configuration page. The page title is 'Medical Inquiry'. Below the title, there is a list of settings with checkboxes. The settings are: 'Enable Email Tracking' (checked), 'Enable "Reply to" with Email Responses' (checked), 'Do not include Vault Email Header and Footer' (checked), 'Enable Case Intake Form' (unchecked), 'Enable Medical Inquiry CRM Data Sharing' (checked), and 'Enable Account Merge' (checked). The 'Enable Account Merge' checkbox and its label are highlighted with a red rectangular border.



Medical Inquiry UI: Case Contact Section

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

The screenshot displays the 'Medical Inquiry Case record' interface. The 'Case Contact' section is highlighted with an orange box. A dropdown menu is open, showing a list of recent contacts: Noor Doctor, John DiFilippo, Cheryl Ackerman, Marc Abbate, ALL, Aaron Kwong, and Aaron Provance. A 'Create' button is visible below the list. A callout points to the 'Edit Contact' and 'Change Contact' options. Another callout points to the 'Case Contact' form, which includes fields for First Name, Last Name, Contact Type, Email, Mobile, National Provider Identifier (NPI), Specialty, and Language. A third callout points to the 'Case Contact' form, stating: 'Users can select an existing Case Contact or create a new Contact without leaving the Case record creation page'. A fourth callout points to the 'Edit Contact' and 'Change Contact' options, stating: 'Newly created contacts and existing contacts can be modified directly from the Case record creation page'.





Medical Inquiry UI: Case Contact Section

- Configuration

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

The screenshot shows the 'Medical Inquiry Case record' configuration page. The left sidebar contains a 'LAYOUT' section with 'Medical Inquiry Case record' and a 'SECTIONS' section with 'Case', 'Case Children', 'Notepad', and 'Case Contact'. The main area is titled 'Case Contact' and has 'Cancel' and 'Save' buttons. It is divided into 'Details' and 'Options' sections. The 'Details' section shows 'Label: Case Contact', 'Name: contact', and a 'Description'. The 'Options' section features a checked 'Enable Contact Section' checkbox, a 'Title' field with 'Case Contact', and a 'Case Contact Field Keys' section with a list of field keys: 'First Name', 'Last Name', 'Contact Type', 'Email', 'Mobile', 'National Provider Identifier (NPI)', 'Specialty', and 'Language'. Two orange callout boxes provide additional information: one points to the 'Enable Contact Section' checkbox, and another points to the 'Case Contact Field Keys' list.

Options

- Enable Contact Section

Title* Case Contact

Case Contact Field Keys

- First Name × Last Name ×
- Contact Type × Email × Mobile ×
- National Provider Identifier (NPI) ×
- Specialty × Language ×

Callout 1: 'Enable Contact Section' checkbox to enable the dedicated Case Contact section on the Case record Creation page

Callout 2: Enabling this section removes the Case Contact field from the Case Children section if previously configured

Callout 3: Add Case Contact Field Keys as desired

- Learn more about [Medical Inquiry](#)





Allow Case Response Emails to be Deleted

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

The screenshot shows the Vault MedComms interface for a Case Response Email. The email details are visible, including the recipient (Domingo Oakley) and the sender (Veeva Vault). A 'MANAGE' dropdown menu is open, showing the 'Delete Email' option highlighted. An orange callout bubble points to this option with the text: "An 'Delete Email' action will be added to the Case Response Email object".

Below the email details, a 'Delete Email' dialog box is displayed. It contains a warning icon and the text: "Are you sure you want to delete this Case Response Email record? You cannot undo this action." The 'Continue' button is highlighted with an orange callout bubble that says: "Click 'Continue' to delete".

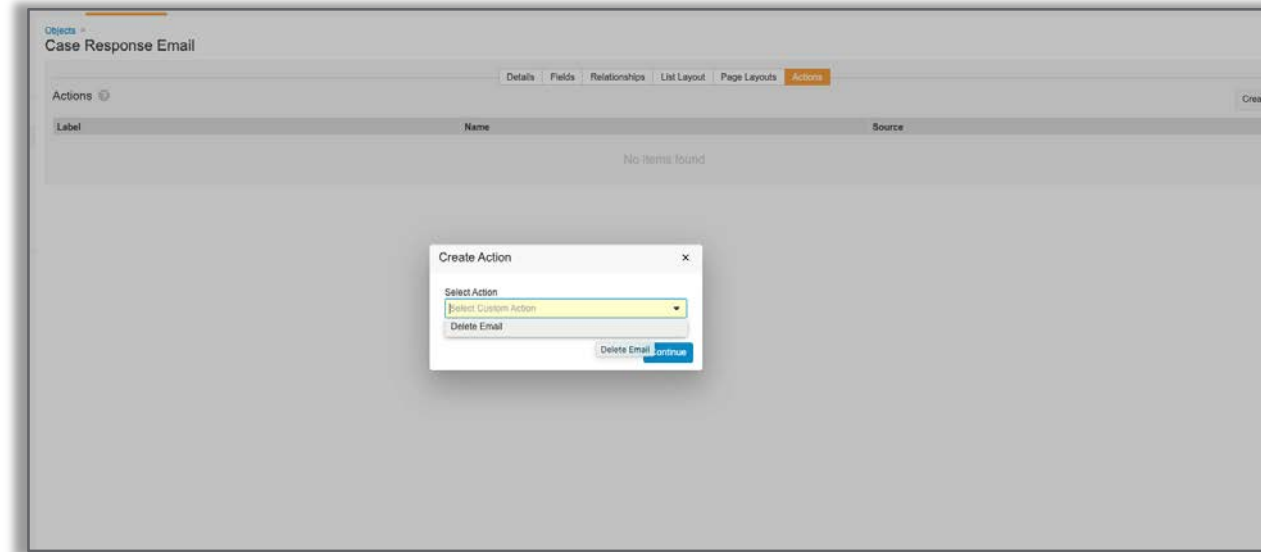


Allow Case Response Emails to be Deleted



- Configuration

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



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

Create Email

Case Details

Response

System Details

Case Details

Case CASE-000007

Case Request CASE-000007 > CR-000012

Case Contact Mat Ryan

Product Cholecap

Case Response Type Email

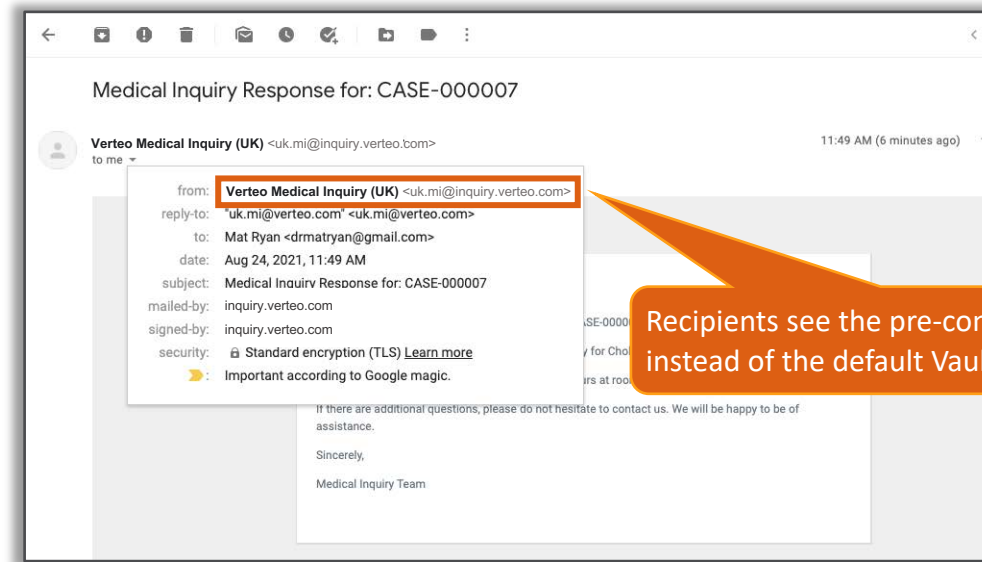
Response

Reply To uk.mi@verteo.com

From uk.mi@inquiry.verteo.com

Response Notes Cholecap is thermally stable for 8 hours at room temperature.

Cover Letter



- Learn more about [Configuring Medical Inquiry Emails](#)



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.

The screenshot shows the Veeva Business Admin interface. The top navigation bar includes Business Admin, Logs, Users & Groups, Configuration (highlighted), Operations, Deployment, Connections, and Settings. The left sidebar shows a 'Platform Configurations' menu with 'Outbound Email Domains' highlighted. The main content area displays the 'Outbound Email Domains' configuration page for the 'Root Domain'. The 'Domain Name' field is highlighted with an orange box, and an orange arrow points to the 'Edit' button. Below the main content, a table shows 'No data found'. A modal window is open, showing the 'Root Domain' configuration form with 'Domain Name*' set to 'verteo.com' and 'Verification Email*' set to 'vm@verteo.com'. An orange callout box points to the 'Verification Email' field with the text: 'Email added to Verification Email receives an email containing a confirmation link that has to be accessed to activate the desired Root Domain'. The modal has 'Cancel' and 'Save' buttons.



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](#)





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](#)





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)

The screenshot shows the Business Admin interface with the 'External Viewer Data' object selected in the left-hand menu. The main area displays a table titled 'All External Viewer Data' with the following columns: Name, External Viewer Channel, CRM Org (if applicable), Date/Time, Document (specific version), and Number of Views. The table contains 8 rows of data, all showing a count of 1 view.

Name	External Viewer Channel	CRM Org (if applicable)	Date/Time	Document (specific version)	Number of Views
VV-00000000000000000000000001		myorg	01/12/2021 07:49 EST	Email template doc 2 (v1.0)	1
VV-00000000000000000000000002		00Di0000000eanREQ	01/12/2021 07:49 EST	Email template doc 2 (v1.0)	1
VV-00000000000000000000000003	Public Distribution		01/12/2021 07:49 EST	Email template doc 2 (v1.0)	1
VV-00000000000000000000000004		myorg	01/12/2021 07:49 EST	Email template doc 2 (v1.0)	1
VV-00000000000000000000000005		00Di0000000eanREQ	01/12/2021 07:49 EST	Email template doc 2 (v1.0)	1
VV-00000000000000000000000006	Public Distribution		01/12/2021 07:49 EST	Email template doc 2 (v1.0)	1
VV-00000000000000000000000007		myorg	01/12/2021 07:48 EST	Email template doc 2 (v1.0)	1
VV-00000000000000000000000008		00Di0000000eanREQ	01/12/2021 07:48 EST	Email template doc 2 (v1.0)	1

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](#)





External Viewer: Number Of Views

- Configuration

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

Job Definitions >
External Viewer Data Mining

Details

Title*
External Viewer Data Mining

Name*
jobsch_external_viewer_data_miner__v

Job Owner*
System

Schedule*
Daily

Time*
12 : 00 AM (GMT+00:00) Greenwic...

Status*
Active

Type*
SDK Job

SDK Job Configuration

Job*
com.veeva.vault.app.commercial.promomats.externalviewer.ExternalViewerDataMiningJob (External viewer audit data mining)

Description
This job mines external viewer audit data, copying the details into the External Viewer Data object



Resources

Resources

- Contact your Customer Success Manager 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/>





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



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

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`)

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`)

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](#)

Skip Document State Change in Object Lifecycle Entry Action



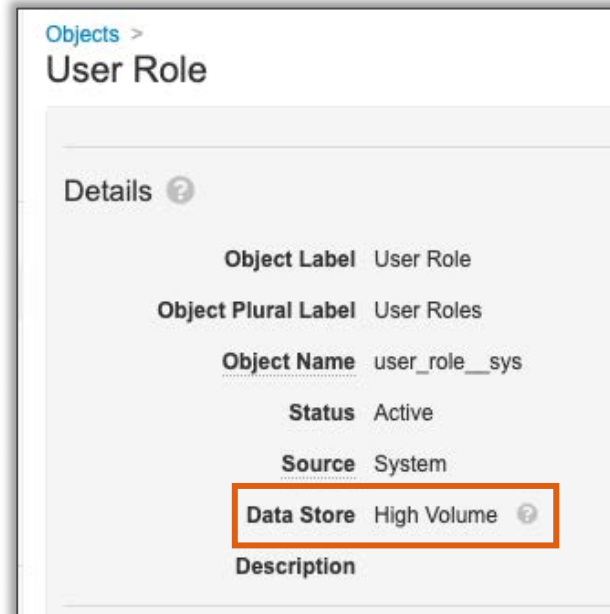
- Object Lifecycle Entry Actions can be configured to skip a state change for related documents, referenced on an object, belonging to a steady state
 - This feature is only relevant for document reference fields on objects that are version specific
 - If the specific version is not found, it will now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

The screenshot shows the 'Entry Actions' configuration page for the 'Approved' state. The breadcrumb trail is 'Object Lifecycles > Claims Lifecycle > Approved'. The page title is 'Entry Actions' with a help icon. There are 'Cancel' and 'Save' buttons. The configuration is set to 'Always' (selected) instead of 'Perform with conditions'. Under 'perform actions', there is a dropdown menu set to 'Change related document lifecycle state'. Below this, there are two dropdown menus: 'Document Reference Field*' set to 'Claim Document' and 'State Type*' set to 'Steady State'. A checkbox labeled 'Skip change state if document version is not found' is checked and highlighted with a red box. An orange callout bubble points to this checkbox with the text 'Relevant for version specific document reference fields'. At the bottom, there is an 'Add Action' button.



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 faceted searches on HVO



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

Vault Compare Report: Header Rows Frozen by Default



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

1	A	B	C	D	E	F	G	H
	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								

- Learn more about using [Vault Compare Report](#)

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](#)

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](#)



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](#)

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](#)



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](#)



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](#)

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



Thank you