22R2 MedComms Release Education

August 2022

Veeva

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22R2 Key Dates

Dates	Event
July 11	(all PODs) Pre-release vaults available
July 11-15	Validation package available on VeevaDocs **July 11**: System Release Memo **July 12**: Compliance Documents **July 15**: Executed OQs
July 27	Technical Release Education https://veeva.zoom.us/webinar/register/6716555095205/WN_4SDAAYWHR7WoJxaF3Y0W8A
July 28	Option 1: Commercial and Medical Content 22R2 Q&A Webinar https://veeva.zoom.us/webinar/register/3416555095657/WN_2AWcze0HQKKA8P2hNPGcbA
July 29	Option 2: Commercial and Medical Content 22R2 Q&A Webinar https://veeva.zoom.us/webinar/register/6216555096337/WN_SI8OemQTRWWngNG4qwcTJA
July 29	Release to all limited release PODs and PODs PODs VV1-2, VV1-1055, VV1-1121 Vault *File Manager does not release at this time, and instead releases with the general release PODs*
August 5	Release to all general release PODs

Icons

On By Default

Enabled By Configuration

Admin Checkbox

Announcements

Veeva

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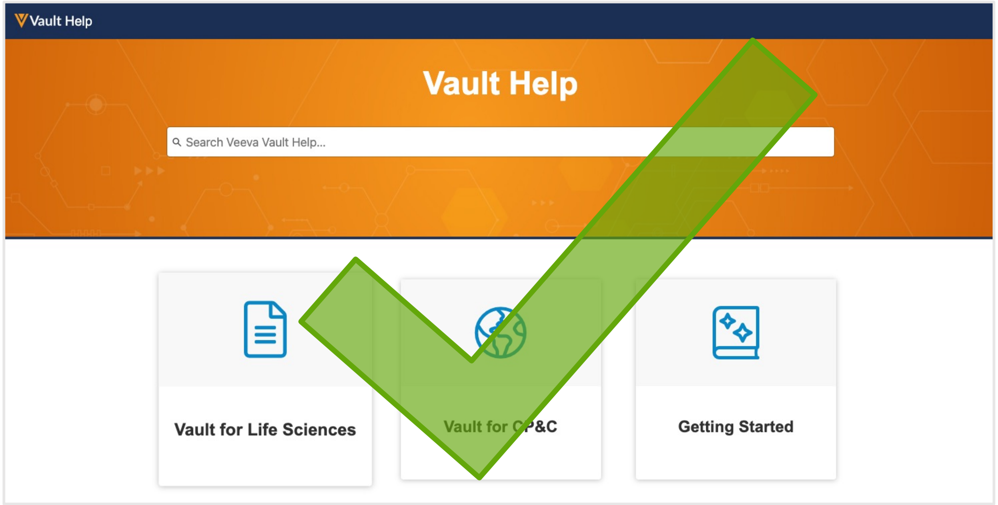
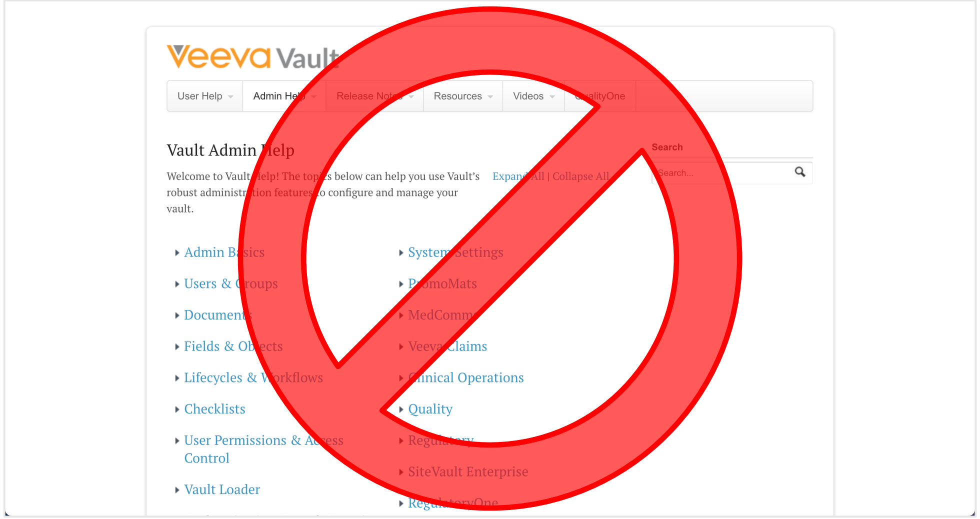
Vault Help Pages – Classic Vault Help Retirement

Introduced with 22R1



New Vault Help Pages

Retired with 22R2



Classic Vault Help Pages

Access the new Vault Help Pages here: https://platform.veevavault.help/en/lr/

Vault Help: Application-Specific Help Pages

https://status.veevavault.help/
https://clinical.veevavault.help/
https://medical.veevavault.help/
https://commercial.veevavault.help/
https://quality.veevavault.help/
https://regulatory.veevavault.help/
https://qualityone.veevavault.help/
https://regulatoryone.veevavault.help/
https://claims.veevavault.help/
https://connections.veevavault.help/

Easily utilize Application Specific URLs

Overview

- Vault Help is now divided into application-specific URLs to present the most relevant information to each Application
- The updated Vault Help page is located here

Business Justification

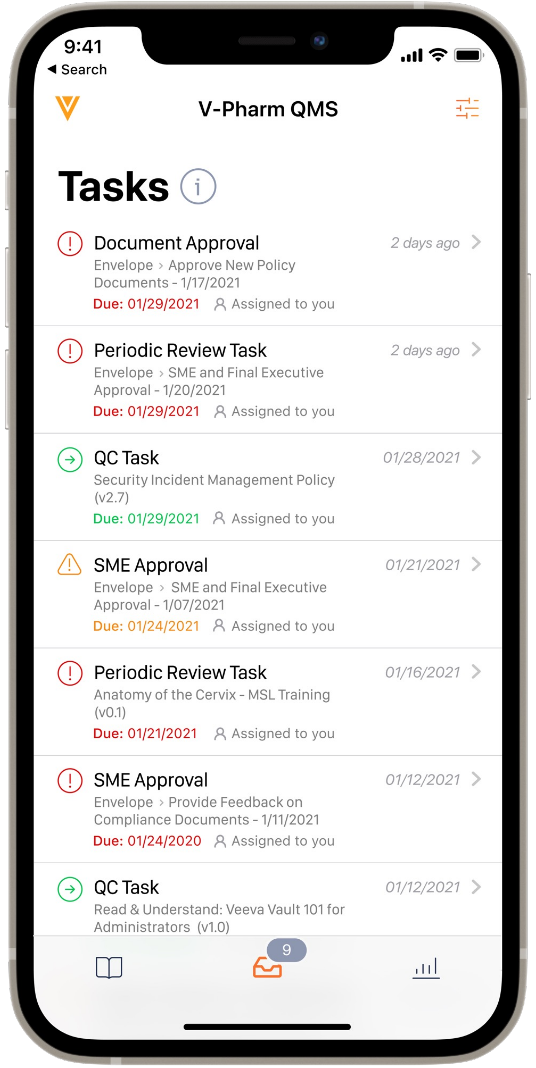
- Admins can more easily navigate the Vault Help Page and decrease search time by identifying Application Suite

Veeva Vault Mobile

- The mobile app for Veeva Vault
- Existing functionality:
  - Search and view documents
  - Share a file to the app to create an unclassified document
- New in 22R2:
  - Filter documents by My, Recent, and Favorites
  - Complete document tasks, and receive a push notification for new tasks
  - Provide an eSignature using phone biometrics (face/touch ID) instead of typing in credentials
  - View your dashboards
- Learn more about [Veeva Vault Mobile]

Download on the App Store

GET IT ON Google Play



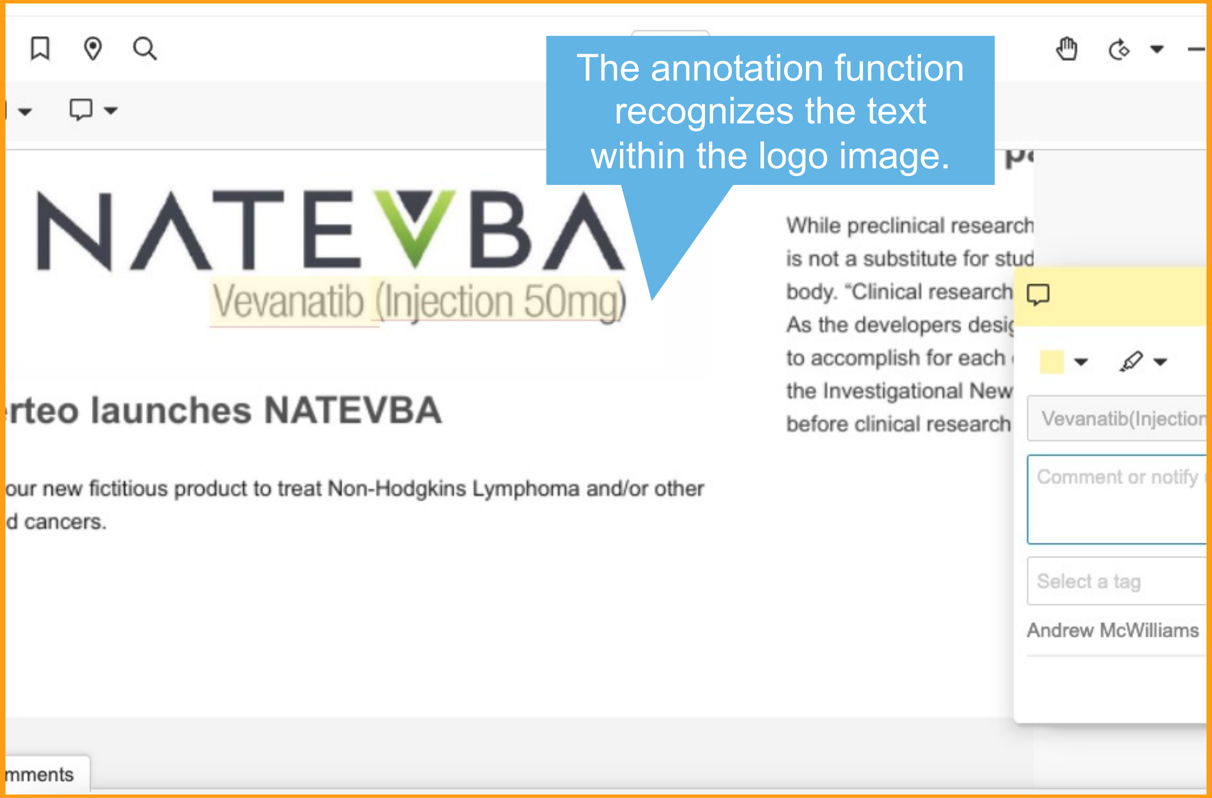
Data Model Changes – Platform & Commercial

- With every release, we update the data model to better support evolving needs and new feature functionality

- The details around the data model changes can be found in the appendix:
  - Platform Data Model Changes
  - Commercial Data Model Changes

Documents

OCR Pages with Images & Text



Overview

- Vault now performs Optical Character Recognition (OCR) on PDF documents that contain both images and text

Business Justification

- This will further support the indexed text capabilities such as searching, highlighting, and annotating

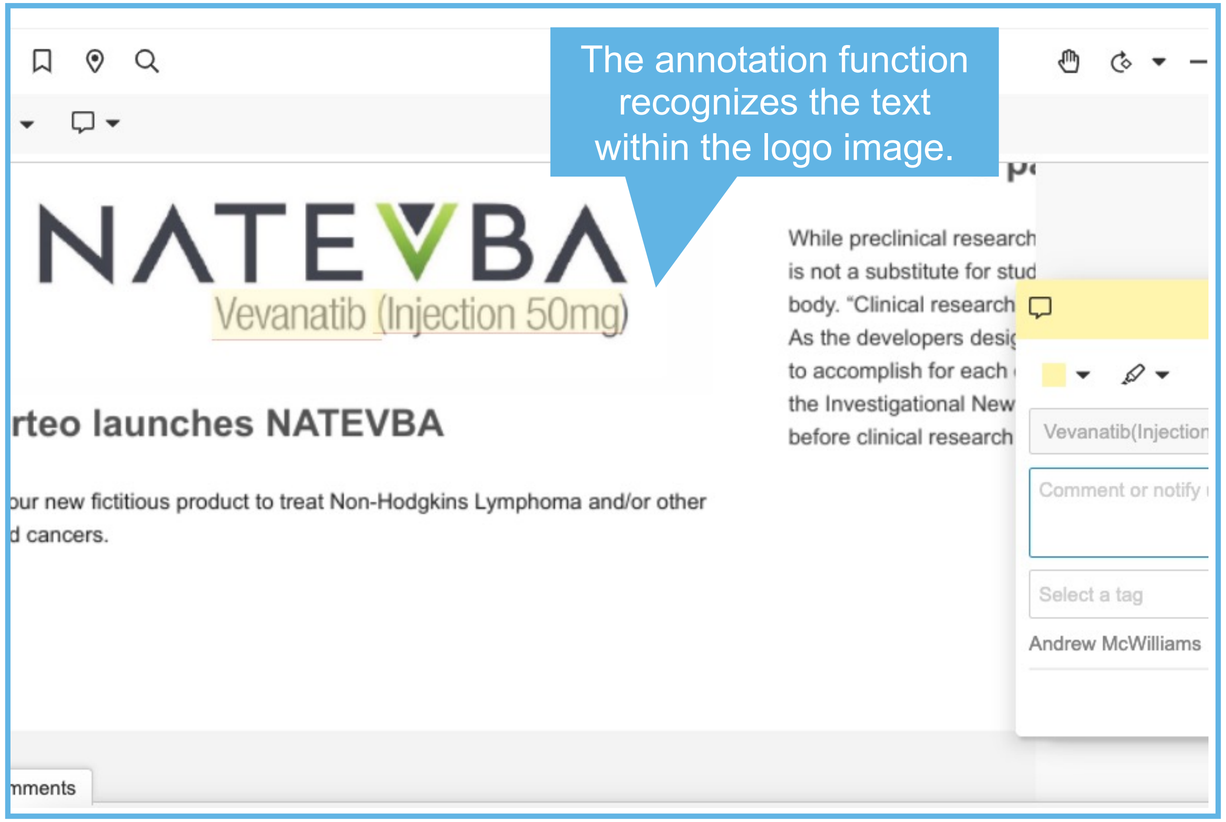
OCR Pages with Images & Text

- Details
  - OCR (Optical Character Recognition) extracts and indexes text within scanned image and PDF source files. The text is then incorporated into the viewable rendition
    - This supports text highlighting, annotations, and copying
    - The indexed text is also searchable in the Vault
  - Previously, Vault performed OCR on PDF documents that contained only images. Documents that contained images and text, were not eligible. For example, a version of a webpage saved as PDF with images, banners, and website text would not have OCR performed
  - With this release, Vault now performs OCR on PDF documents that contain both images and text
- Considerations
  - This enhancement is specific to PDF source documents
  - The same system limitations for the OCR functionality also apply to this feature, including:
    - OCR functionality is optimized for English text, but does extract Latin characters for other languages as well
      - OCR Extended Language support is targeted for future releases
    - OCR is optimized for recognizing typed text

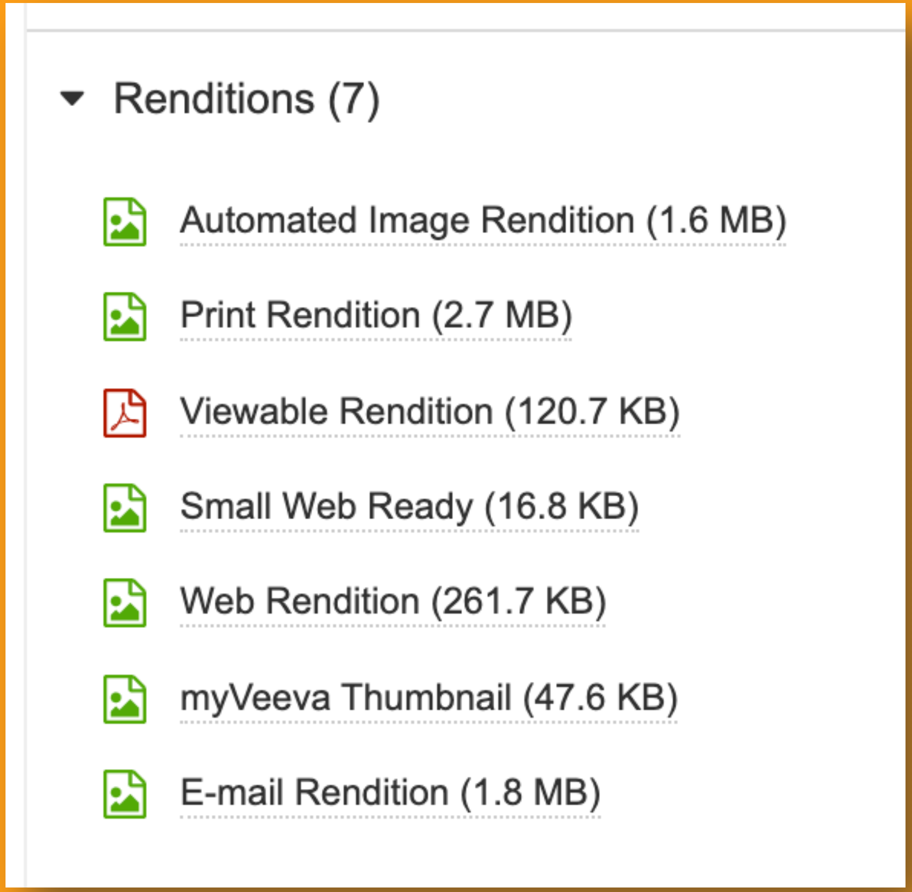
OCR Pages with Images & Text

Before

After



AIR PSD Image Enhancements



Overview

- This feature introduces the option to improve the image quality of PSD images in PNG Automated Image Renditions (AIR)

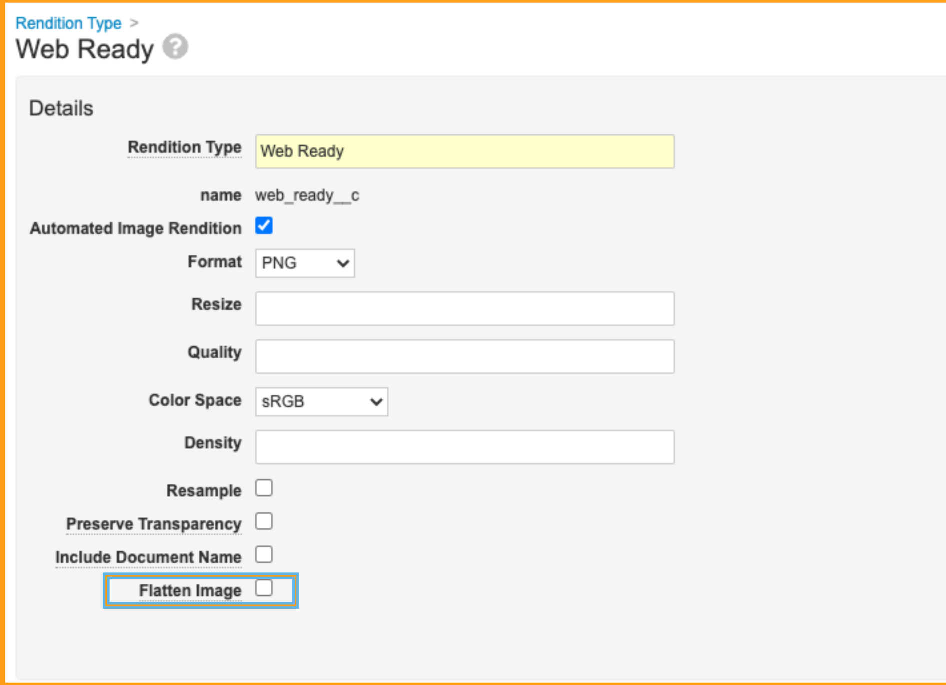
Business Justification

- PNG renditions of PSD images were rendered incorrectly when generated using the AIR feature
- This interrupted business process when bulk uploading images since each image need to be uploaded manually

AIR PSD Image Enhancements

- Considerations
  - Contact support to have **Enhanced PSD Image Rendering** enabled
  - The PDF rendition will be used to convert to PNG instead of the original source file resulting in a higher quality image

Automated Image Rendition Flattening



Overview

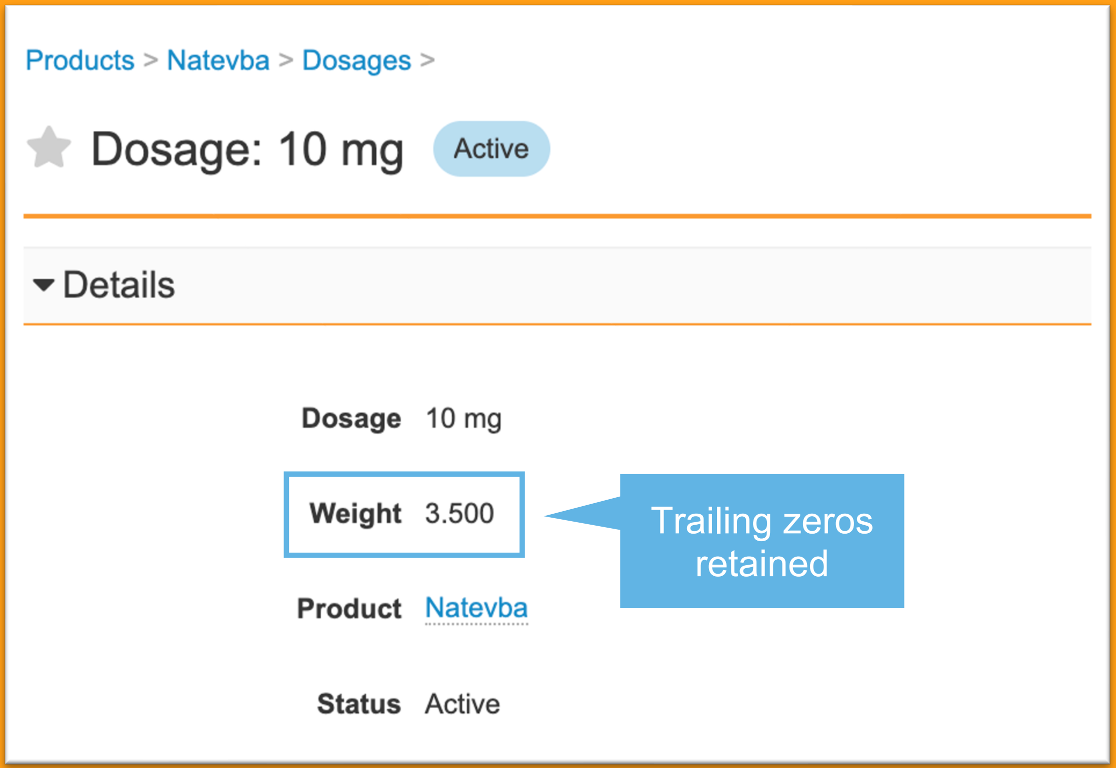
- New checkbox option on the Rendition Type configuration that automates the rendered image to be flattened
- The image may not have the same appearance. In some instances, because the image is not flattened it leads to a poorer rendition. By flattening the rendition appearance will be improved

- **Business Justification**
- Improved image appearance in some instances
- Reduced file size and decreased processing time

- Learn more about Renditions

Objects

Number Field Decimal Places Enhancement



Overview

- When editing the Number field on an object record, if a user includes decimal places with trailing zeroes (e.g., 165.100), they will no longer appear trimmed when saved in the record detail view

Business Justification

- Previously, saving a Number field removed any trailing zeroes included in the decimal places
- This behavior could easily lead to a compliance issue as Vault user may end up changing the precision of several decimal fields on a record without intending to

Number Field Decimal Places Enhancement

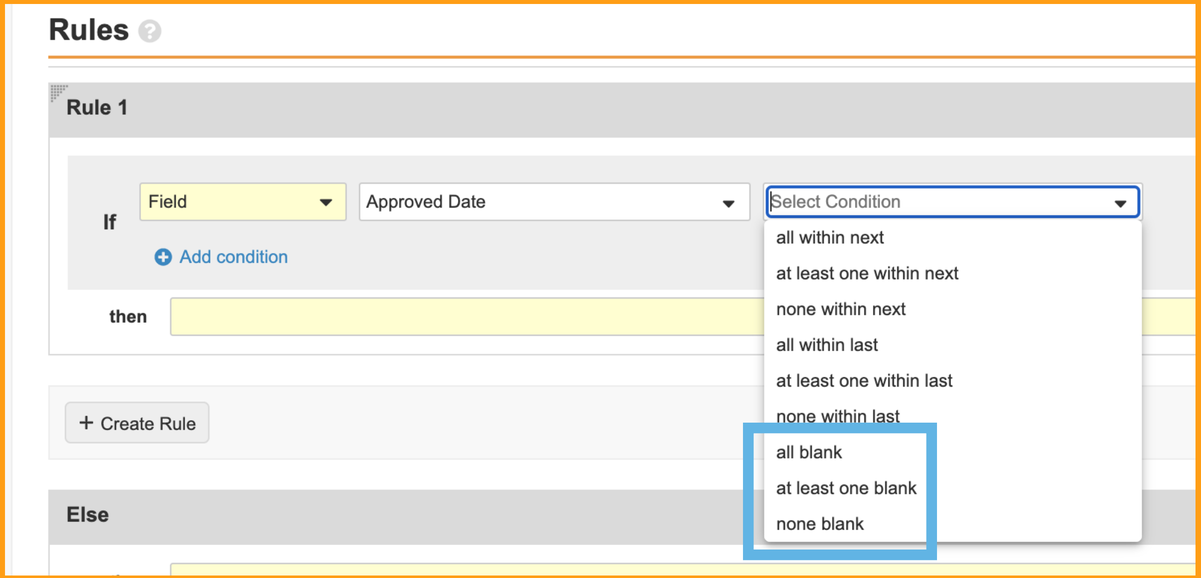
- Details
  - When creating, viewing or editing an object record, user shall be able to enter a value into a number field or currency field with trailing zeroes in the decimal point (e.g., 165.50) without the UI trimming it upon save and in future edits

- Considerations
  - The number trailing zeros allowed will correspond to the number of decimal places set in the field options
  - This feature is intended for Standard Volume Objects (SVO) but will introduce changes to High Volume Object behavior as well (due to shared code between the two) that will be inconsistent with SVO

Lifecycles and OneWorkflow

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

New Operators for Workflow on Documents (1 of 2)



Overview

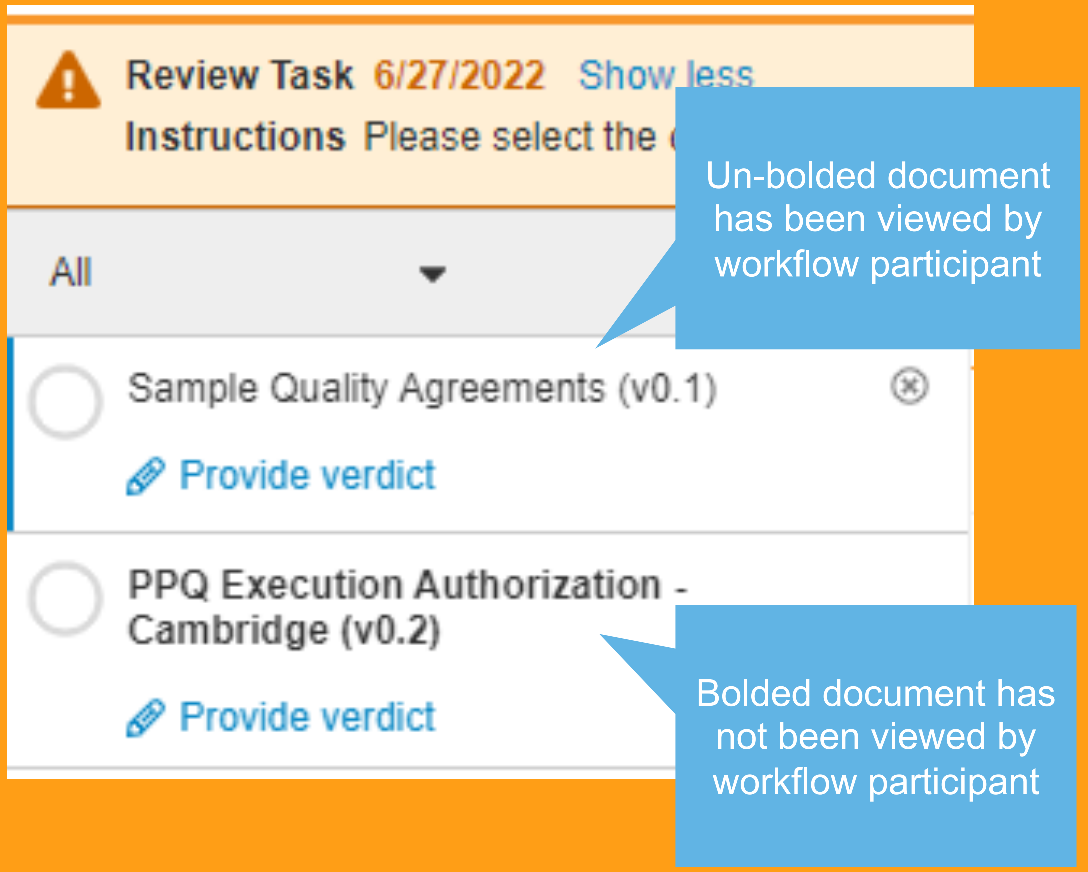
- System Admins now have new conditional operators available for document workflow decision step configurations:
  - all blank
  - at least one blank
  - none blank

Business Justification

- Provide more flexibility to create workflow decision step rules on documents based on document field values

- Learn more about Decision Steps

New Operators for Workflow on Documents (2 of 2)



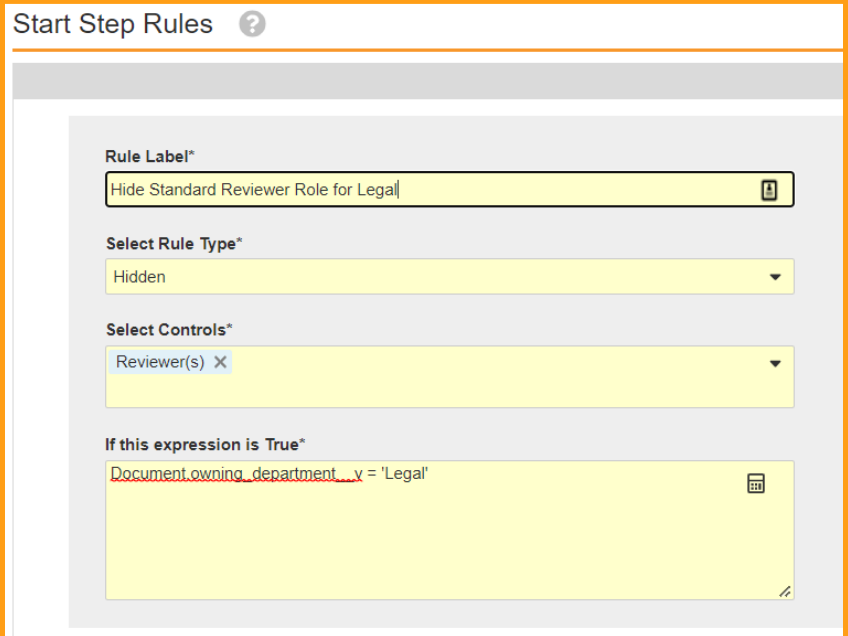
Overview

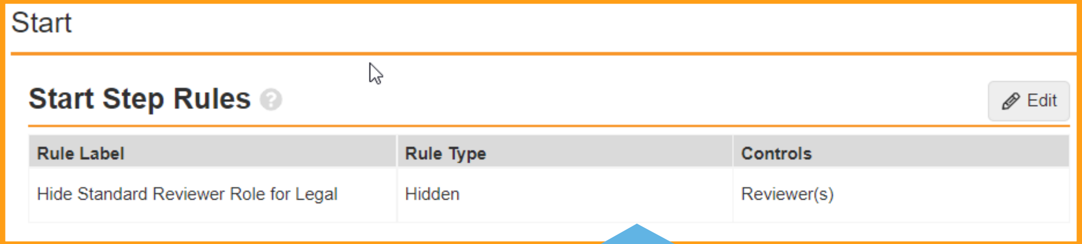
- Workflow participants viewing a task containing multiple documents will see names of documents they have not viewed appear in bold

Business Justification

- Helps users determine which documents they already viewed within a workflow task
- Learn more about using a workflow with multiple documents

Increase in Workflow Start Step Rules





This feature increases the number of possible Start Step rules

Overview

- This feature increases the number of Workflow Start Step rules a System Admin can configure in OneWorkflows

Business Justification

- Increasing this limit enables customers using the *Advanced Workflow Role Configuration* feature in Legacy Workflows to transition to Start Step rules in OneWorkflows

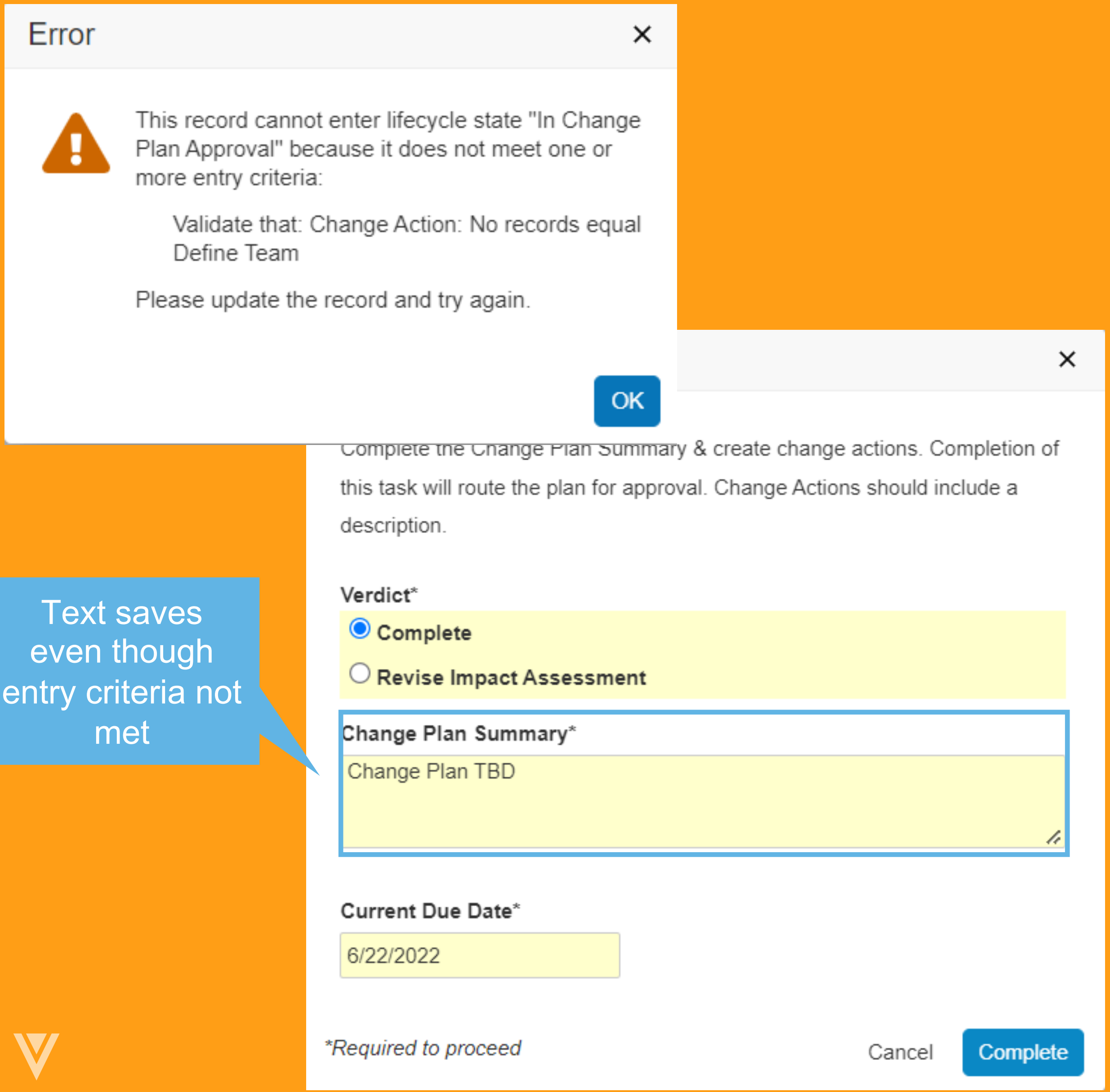
Increase in Workflow Start Step Rules

- Details
  - System Admins can now configure …
    - Up to 20 Start Step rules in a OneWorkflow that can route multiple documents
    - Up to 30 Start Step rules in a OneWorkflow that is configured to route one document at a time

- Considerations
  - OneWorkflow Start Step rules allow System Admins to make participant roles and other controls on the workflow start screen mandatory or hidden
  - A OneWorkflow Start Step rule uses a Vault expression that must evaluate to TRUE to make a control hidden or required, and the expression evaluates the value in document metadata fields within the expression for <u>every document</u> in the workflow
  - Note: The maximum number of Start Step rules for an Object workflow is 30 (single item workflow)

- Learn more about <u>OneWorkflow Start Step Rules</u>

Save Task Information



Text saves even though entry criteria not met

Overview

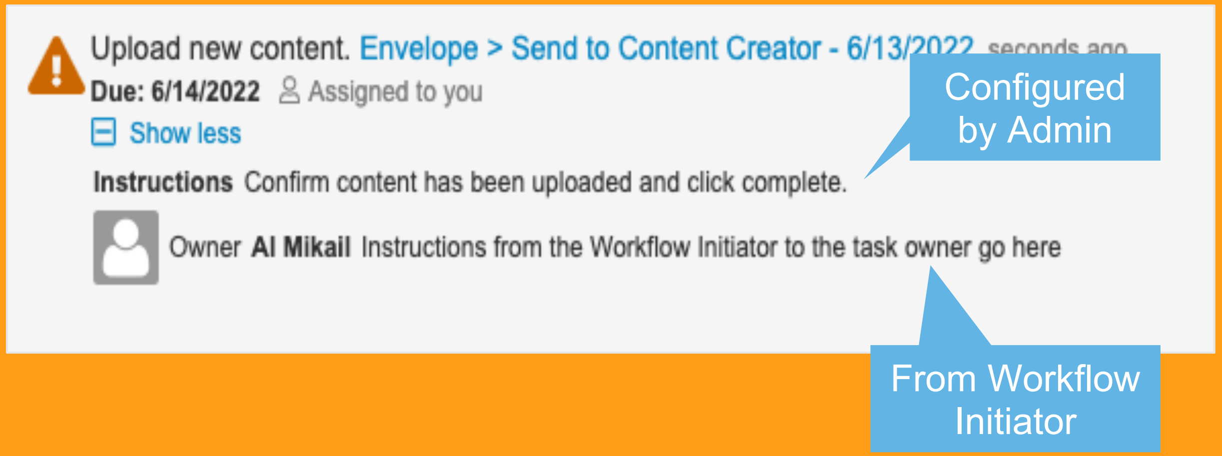
- This feature saves information entered into a task completion dialog box until automatic subsequent workflow steps are complete
- Previously, if an automatic step failed then Task Owners would have to re-enter the information
    - E.g., entry criteria not met

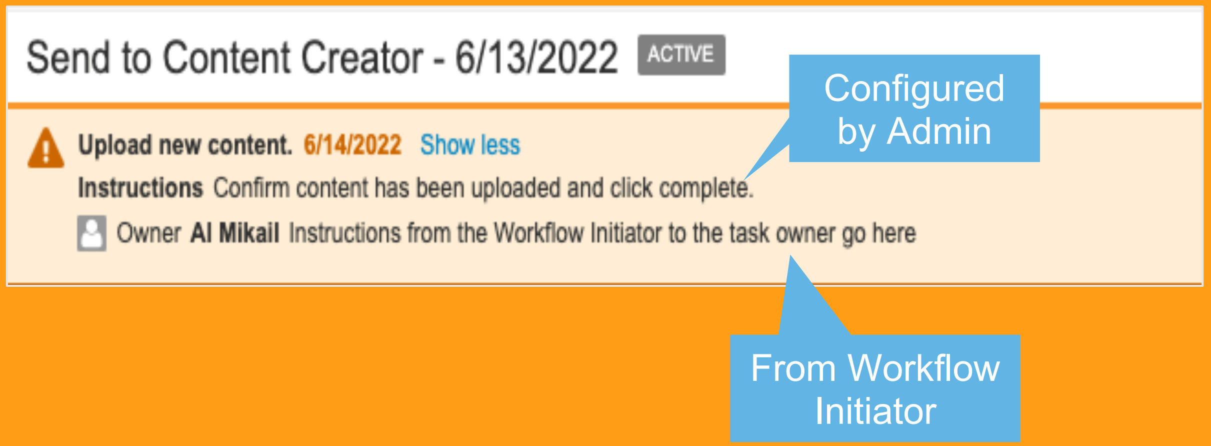
Business Justification

- Provides a better user experience by saving time and removing the need for re-work

- Learn more about completing assigned tasks

Task Instruction Visibility in OneWorkflow





Overview

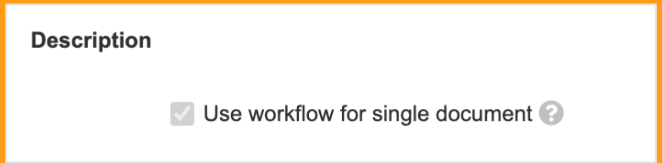
- **Task Instructions** from the *Workflow Initiator*, and *Admin configured* on the task, are now visible on the **Home tab** and in the **record / document page**

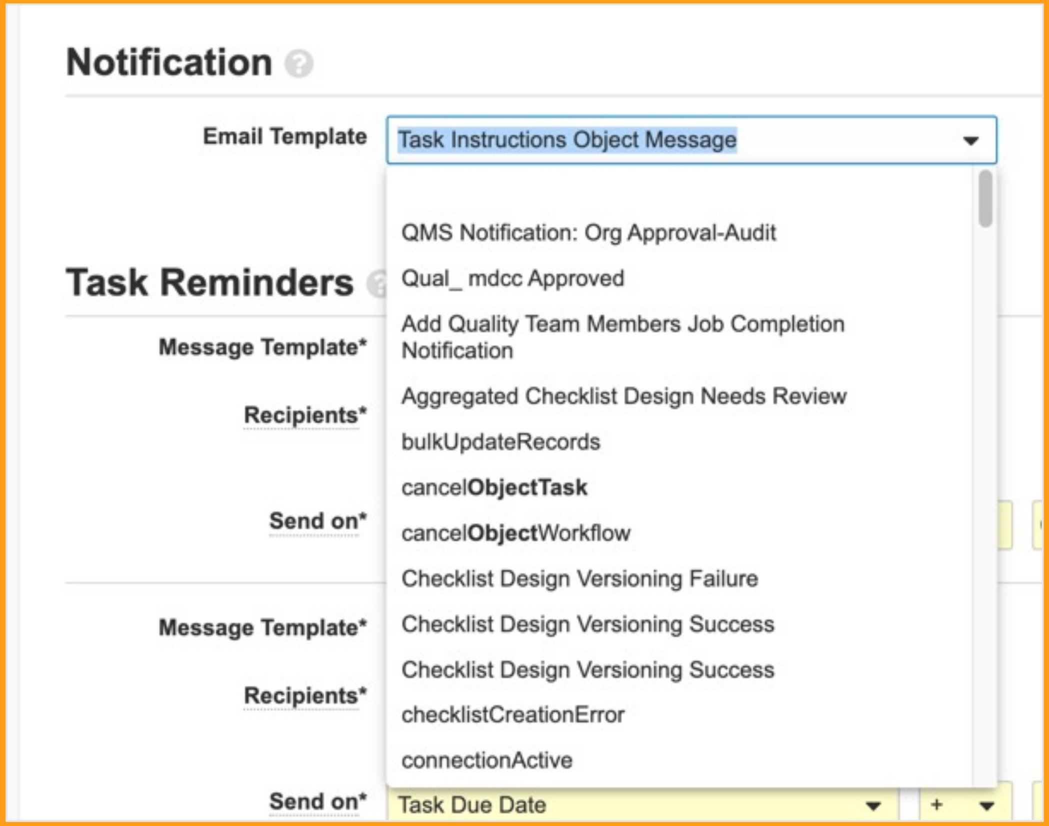
Business Justification

- Make Task Instructions for OneWorkflows more visible

- Learn more about Configuring Document Workflows

Document Notification Templates in OneWorkflows on Single Documents





Overview

- This feature allows System Admins to configure notifications to participants in OneWorkflows used to route a single document

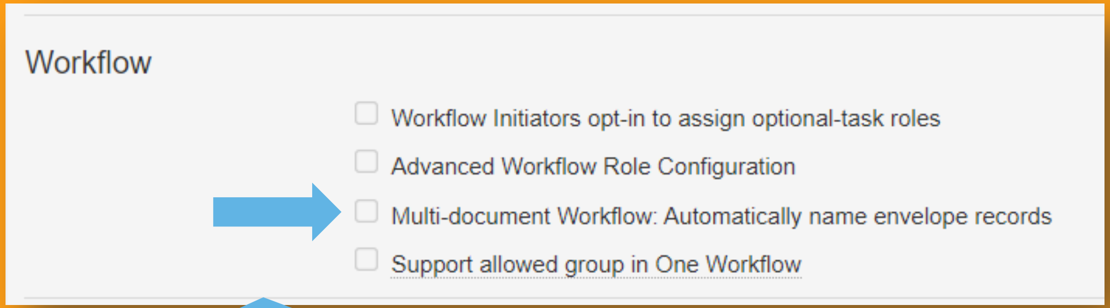
Business Justification

- Close a gap between Legacy workflows and OneWorkflows

Document Notification Templates in OneWorkflows on Single Documents

- Details
  - A System Admin will have the option of selecting a Notification Template when a document OneWorkflow is configured to route a single document
  - A Notification Template can be configured in …
    - A document workflow task
    - A notification step associated with a document workflow task
    - A task reminder notification
    - Cancellation action

Automatically Name Envelope Records Flag Exposed in Settings



Navigate to **Admin > Settings > General Settings** and click **Edit**

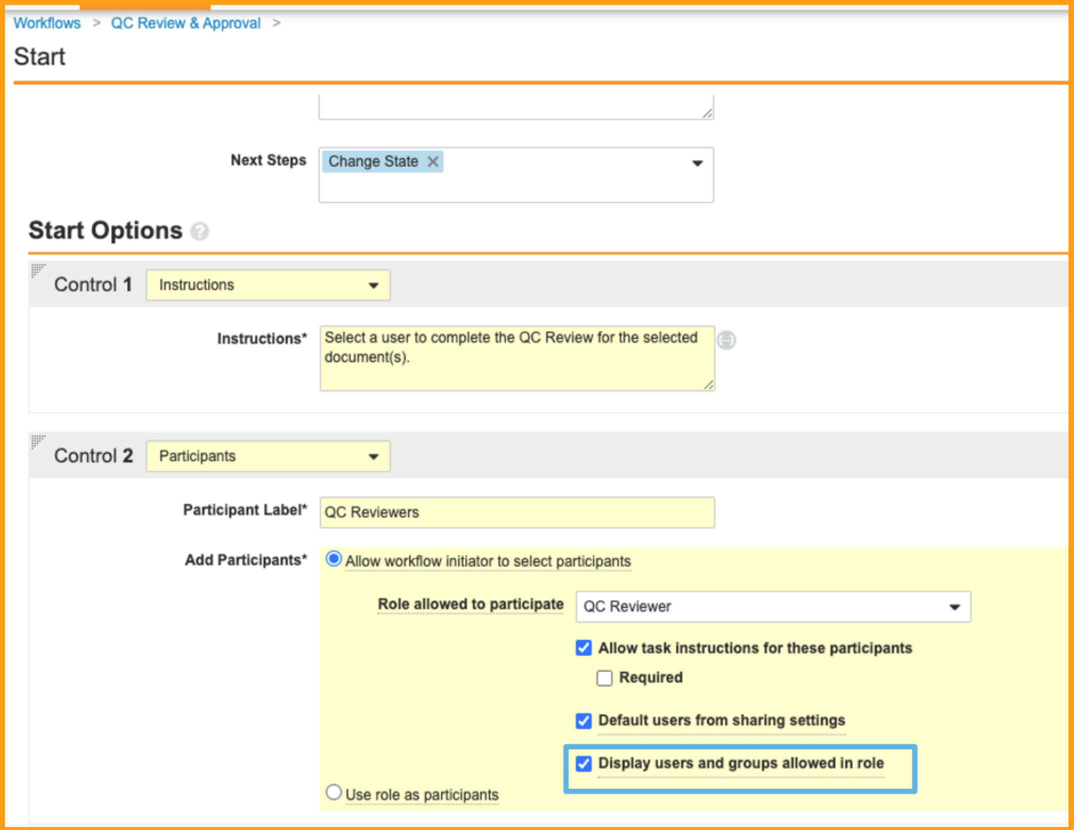
Overview

- Allows admins to enable automatic naming of their envelope records used in OneWorkflows
- Prior to this feature, this flag had to be enabled by support

Business Justification

- Some organizations will want Vault to automatically assign *Name* values
- Once this setting is enabled, the details page for each document workflow configuration shows *Envelope Details*
- In the current release, this functionality only supports text strings and the *Autonumber* token

Include Users Allowed in Role



Overview

- Allows OneWorkflow participant control to expose users that are allowed in a certain document lifecycle role
- Includes users and groups allowed via Dynamic Access Control as well as via role defaults and override rules

Business Justification

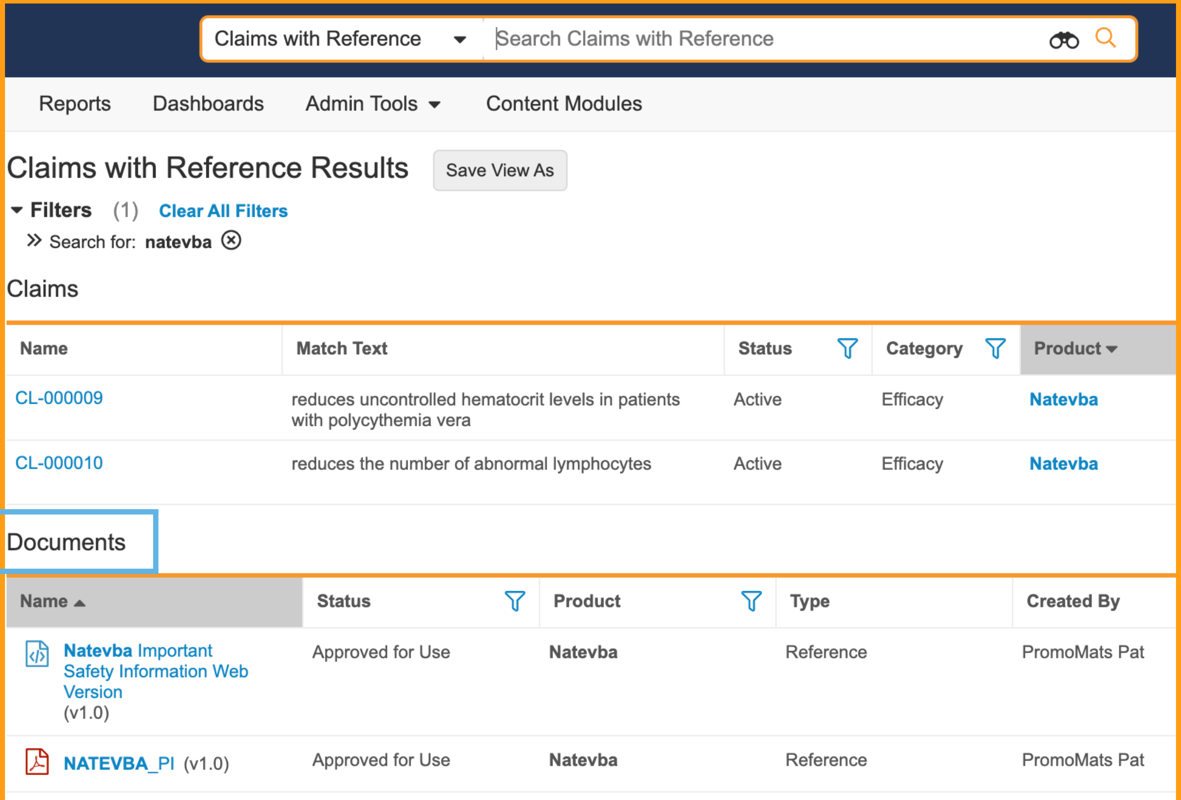
- Ensures full visibility when starting a workflow to all users who have permissions to participate in the workflow
- Aligns OneWorkflow capabilities with Legacy Workflows

Include Users Allowed in Role

- Details
  - Admins can enable this feature for a specific participant control by selecting the flag "Display users and groups allowed in role" in the Start step configuration
- Considerations
  - For legacy workflows, the default behavior is to show all users allowed in Roles; with OneWorkflow, this requires the Admin to enable this in the Start step

Searching & Filtering

Add Documents to Expanded Search



Overview

- This feature adds the ability to search both documents and objects simultaneously and provides more direct navigation to the Expanded Search experience

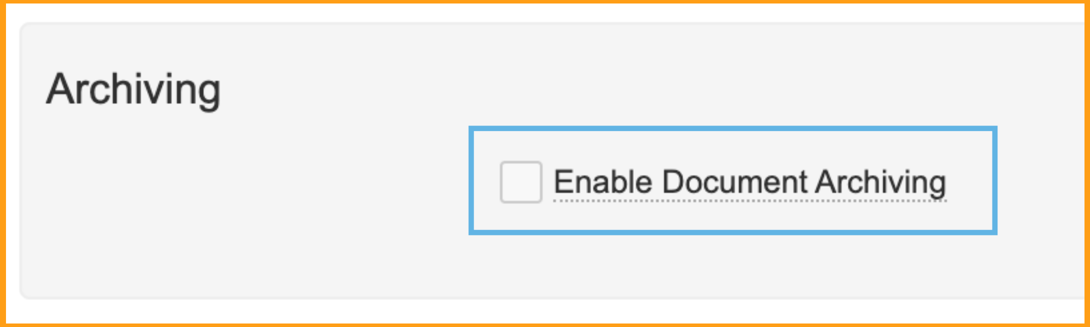
Business Justification

- Previously, only objects could be added to a Collection and users had to perform a separate document search to see a complete result set
- Expanded Search collections are less buried in the navigation and more discoverable by users

Add Documents to Expanded Search

- Details
  - Expanded Search Collection feature will have a new option for document types
  - When adding documents to a collection, Admins can choose to include all documents or a specific document type
  - A new option to apply VQL criteria will allow filtering to be applied to each section within an expanded search
  - Updates to the search context selector where users can navigate to tabs, sub-tabs, and collections
- Considerations
  - Limit of 15 Collection Items already exist for expanded search
- Learn more about Expanded Search

Add Archive Option to Search Settings



Overview

- Prior to 22R2, customers needed to request for document archiving to be enabled on their Vaults
- The archiving option has been added to the Settings>Search Settings

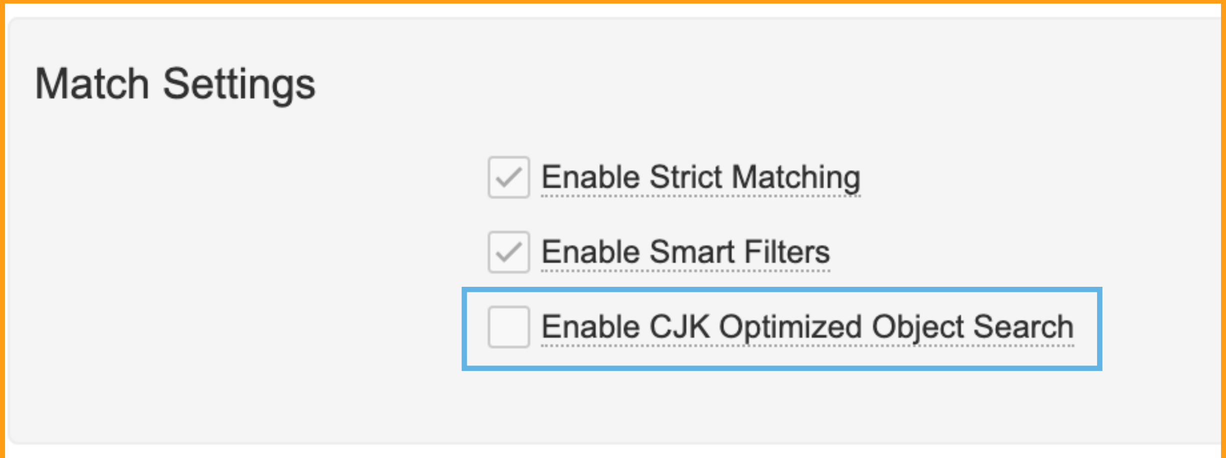
Business Justification

- Provides Admins direct control over this capability rather than having to go through Veeva Support for enablement

Add Archive Option to Search Settings

- Considerations
  - This is a one-way enablement – once enabled, this feature cannot be disabled. A warning will appear at the time of enablement alerting the Admin accordingly

Add CJK Indexing Option to Search Settings



Overview

- Customers with a lot of Japanese, Chinese or Korean text in their object records previously had to contact support to optimize searching in these languages
- We've now added this option to the search settings so administrators can enable or disable it themselves

Business Justification

- Provides Admins direct control over this capability rather than having to go through Veeva Support for enablement

Add CJK Indexing Option to Search Settings

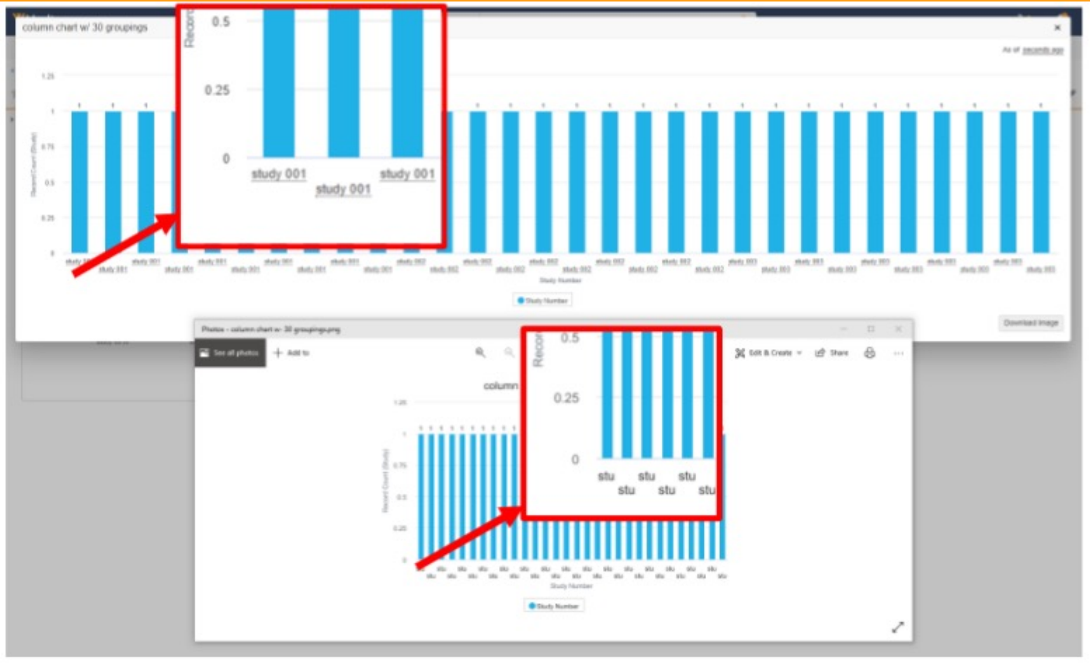
- Details
  - When enabled, Vault searches for object records using a dictionary to separate words
    - Improves mapping for Chinese, Japanese, and Korean
  - System Admins can enable this Indexing Option by navigating to Settings and checking the box “Enable CJK Optimized Object Search”

- Considerations
  - If you enable this option, Vault must reindex all objects which may take several hours
    - While the reindexing is in progress, Vault displays (pending) next to the Enable CJK Optimized Object Search option and you cannot select or clear it

- Learn more about Search Settings

Reporting

Dashboard exports for large charts



Download Image — Previous download button

Small Image   Large Image — New download buttons

Overview

- The "Download Image" button on expanded dashboard chart is now replaced with two new buttons

Business Justification

- Currently dashboard exports are limited to 600 px width. This does not match the width of the expanded chart, which is based on the browser window size
- Feature prevents labels being truncated or unreadable for charts with a lot of data

Support Document Roles as Reporting Object

Users and Groups assigned to Document Roles for a list of documents

Document Role Name	User	Group	Type	Document Name
Owner	Pukar Bhandari		User	Untitled Report (v1.0)
Viewer		All internal Users	Groups	Untitled Report (v1.0)
Coordinator	Pukar Bhandari		User	SOP_IRB-Meeting-Prep (v0.3)
Owner	Pukar Bhandari		User	SOP_IRB-Meeting-Prep (v0.3)
Editor	Editor User		User	SOP_IRB-Meeting-Prep (v0.3)
Viewer	R_U		User	SOP_IRB-Meeting-Prep (v0.3)

Document	Document Role	User	
Document Name ▲	Name	Name	Status
Document Name 1 (v0.1)	Editor	User Name 2	Inactive
Document Name 1 (v0.1)	Coordinator	User Name 3	Active
Document Name 2 (v0.3)	Owner	User Name 1	Active
Document Name 2 (v0.3)	Editor	User Name 4	Active
Document Name 2 (v0.3)	Viewer	User Name 3	Active

Document Roles and the assigned Users for a list of documents

Overview

- This feature enables users to report on documents and their user roles, for example:
  - Users and groups assigned to each role on documents
  - Documents with specific owners, or reviewers, or approvers, etc.
  - Inactive users and their roles on documents

Business Justification

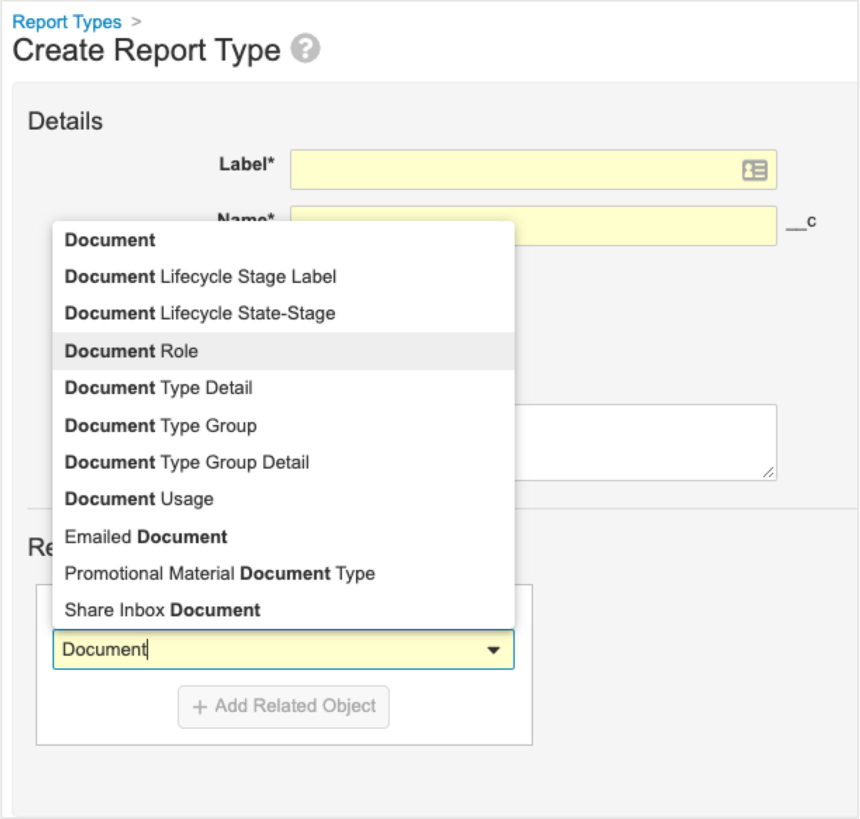
- Allow customers to check document access across multiple documents, instead of one by one

- Learn more about Configuring Report Types

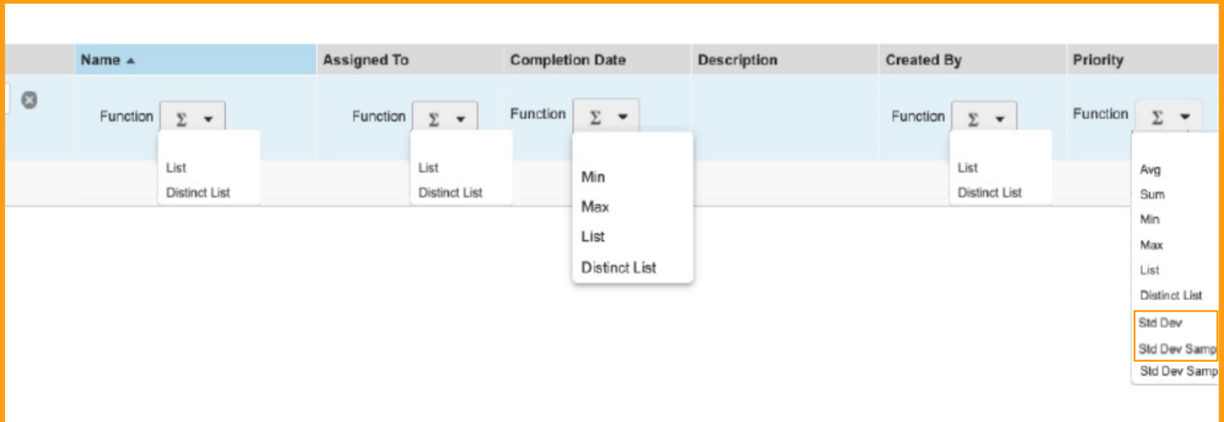
Support Document Roles as Reporting Object

- Details
  - This feature introduces a new **Document Role** *Report Type* that allows end-users to create standard and multi-pass reports that display document roles, and the users/groups in those roles

- Considerations
  - While this is considered an Auto-On feature, an Admin will need to create a new report type (Admin > Configuration > Create Report Type) and select the Document Role Report Type to make such a report available to the end user



Additional Aggregate Functions in Reports



Overview

- This feature adds additional aggregate functions to Vault reports
- “List” and “Distinct List” which return a concatenated list of records in a single cell
- “Std Dev” and “Std Dev Samp” return the standard deviations for a distribution

Business Justification

- Business requirement to improve reporting functionality

Considerations

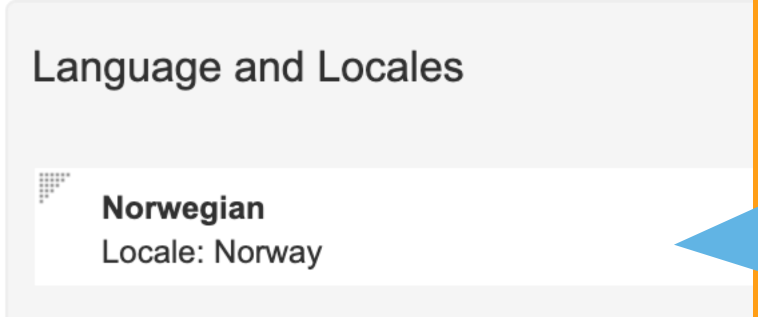
- List and Distinct List will be added to all data types except long/rich text fields
- Std Dev and Std Dev Samp will be added to number fields

- Learn more about [Vault Reports]

Usability & Interface

Localize Vault to Norwegian

Navigate to Settings > Language & Region Settings



Reorder the languages and drag Norwegian to the top to make Norwegian the default Vault language

Overview

- Users can update the language Vault displays on static labels to Norwegian by changing the language settings in their User Profile
- Administrators can fully localize Vault by using the Bulk Translation tool to modify custom labels

Business Justification

- Forbedrer den norske brukeropplevelsen ved å tilby lokale språk i Vault

(engl.: Significantly enhances Norwegian end-users experience by providing local language in Vault)

Localize Vault to Norwegian

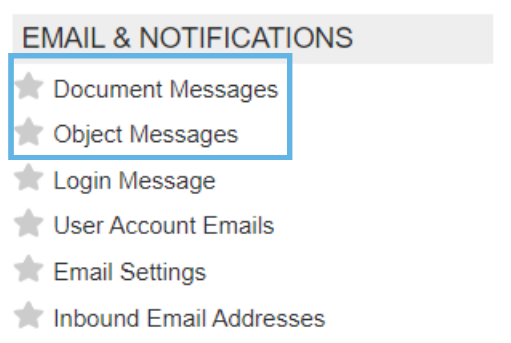
- Details
  - Users can select Norwegian as their language in Vault through the User Profile, and all static labels will be updated
  - Admins can utilize the Bulk Translation tool to translate all other dynamic labels
  - Vault also supports setting Norwegian translations for labels in data such as document types, fields, picklist values, and lifecycle names

- Considerations
  - After the 22R2 release, Norwegian will be available in all Vaults for users to change language and localize Vaults
  - In order to leverage the localization of Norwegian in Vault, the Language and Region Settings need to be reordered by admins, placing Norwegian at the top of the list

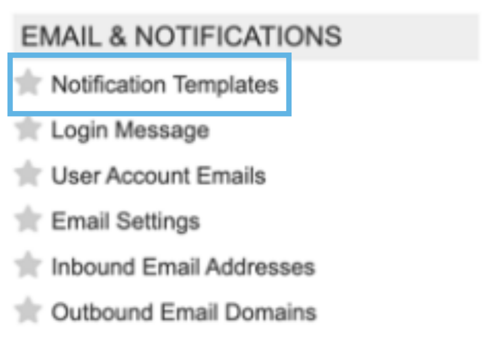
- Learn more about [Localize Vault to Norwegian]

Notification Template Tab

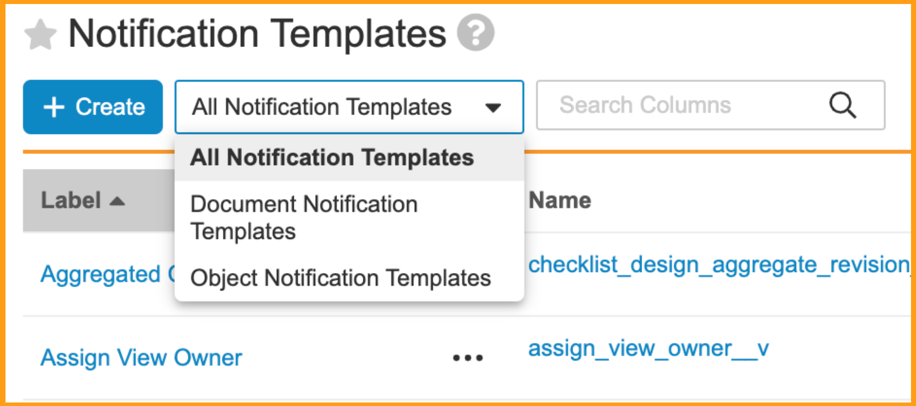
Before 22R2



After 22R2



After 22R2



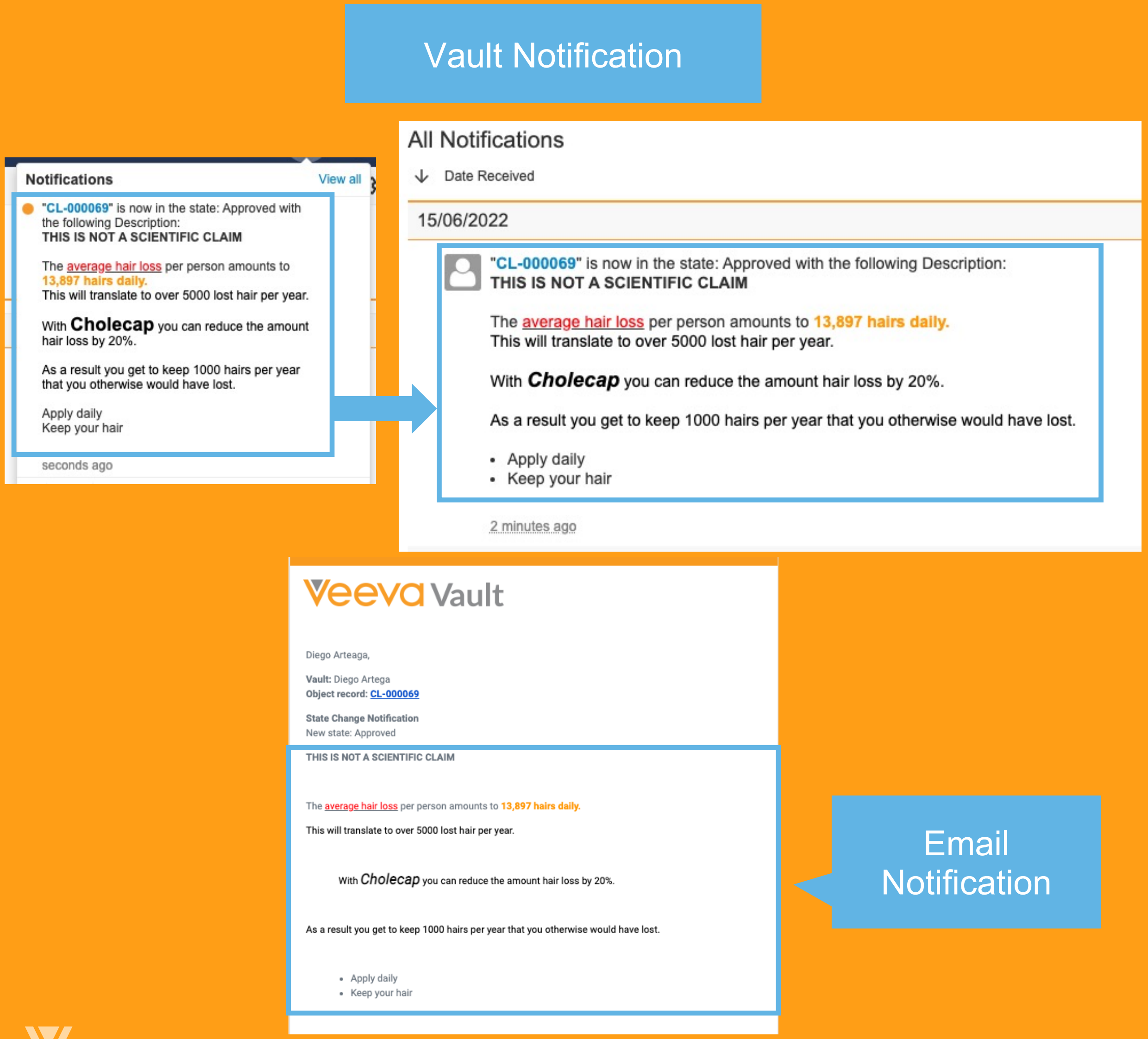
Overview

- This feature combines the Document Messages tab and the Object Messages tab into a single tab called Notification Templates
- The User Interface will allow System Admins to differentiate between Object and Document notification templates

Business Justification

- Veeva continues to consolidate separate document and object configurations into a single System Admin experience to align with OneWorkflow

Notifications: Rich Text in Email Body and Notification Text



Overview

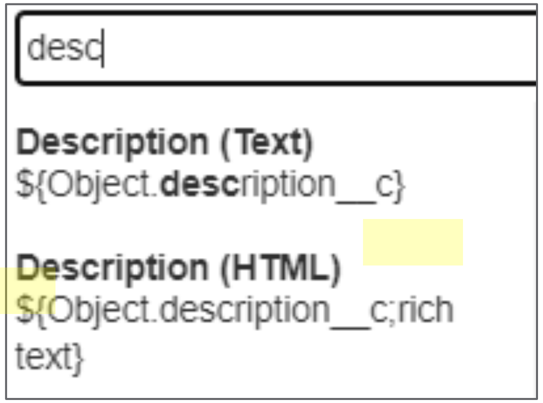
- Allows rich text fields in object records to be displayed as rich text in the
  - Text in Vault UI notifications
  - Email body from Vault notifications

Business Justification

- Display rich text object record fields in notifications the way they appear in object records – as rich text

Notifications: Rich Text in Email Body and Notification Text

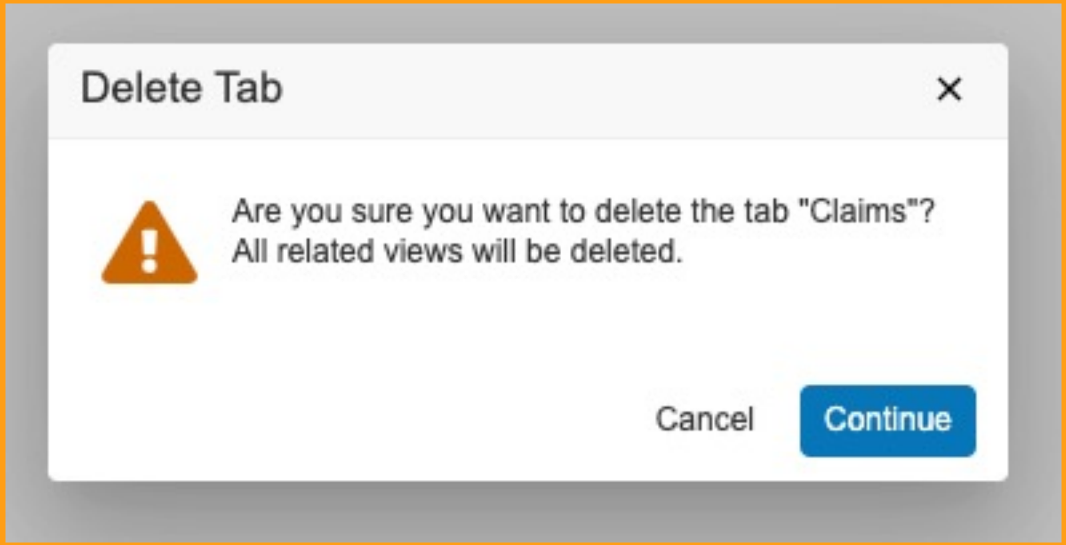
- Details
  - Notification templates now allow the selection of a rich text fields to be included in the notification template in two different flavors:
    - Plain text - example: ${Object.description__c}
    - Rich Text – example: ${Object.description__c;**richtext**}
  - By selecting the {…;richtext} field option, notification templates will include the content of rich text field the way it was formatted by the end user on the object record



- Considerations
  - After the 22R2 release, notifications containing rich text fields will continue to display as plain text
  - In order to leverage the rich text formatting in notifications templates, the rich text variant of the field needs to be selected {…;richtext} in the respective notification template
  - Rich text fields are only available in object records / object record notifications

- Learn more about Notifications

View Delete Warning when Deleting Tab



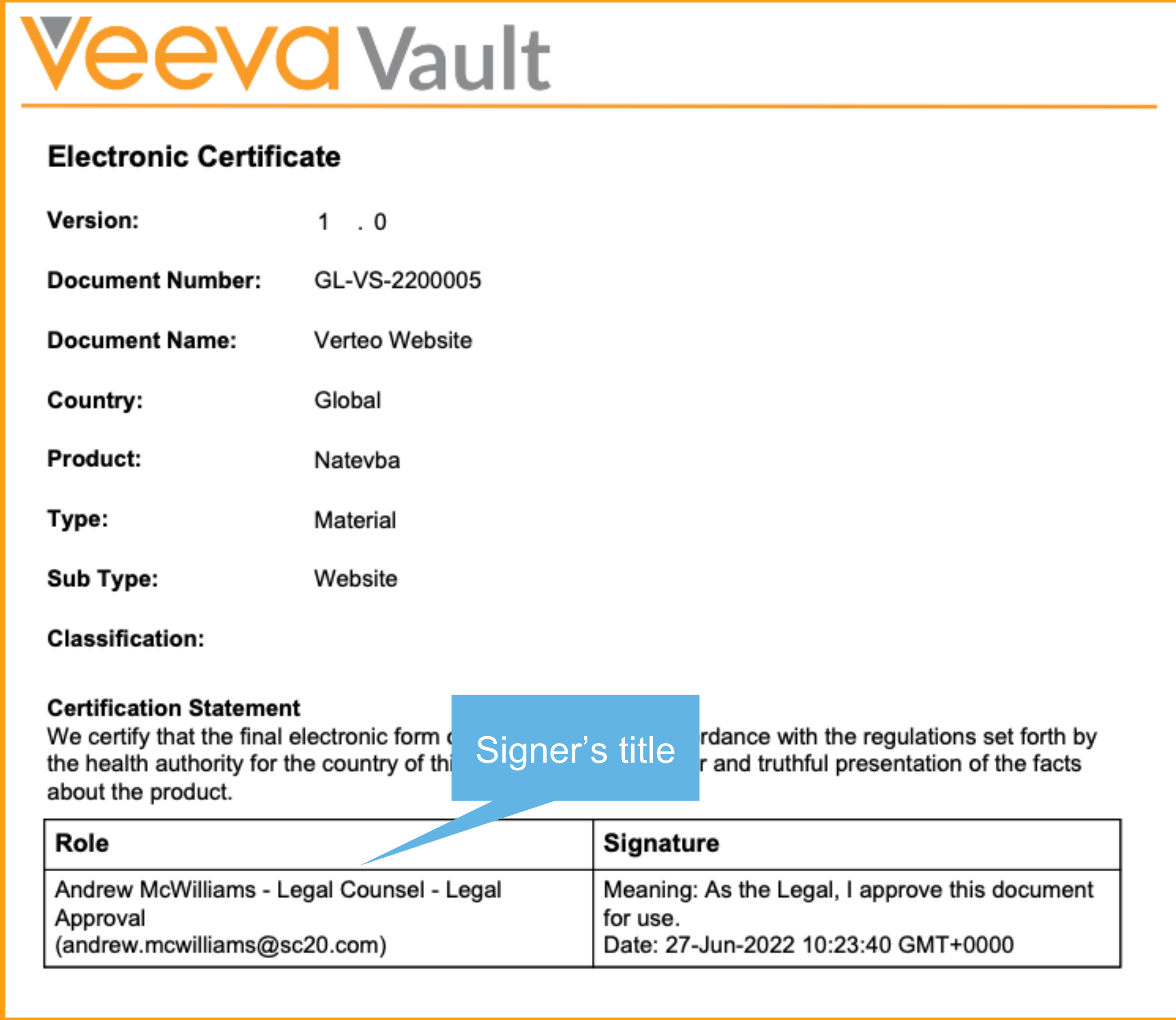
Overview

- To help prevent Admins from deleting tabs and related views in error, Vault now displays a warning when attempting to delete a tab

Business Justification

- The warning has been added as an additional safeguard for admins to confirm that they actually want to delete selected tabs and related views

Preserve eSignature Page Signer Info



Veeva Vault

Electronic Certificate

Version:	1 . 0
Document Number:	GL-VS-2200005
Document Name:	Verteo Website
Country:	Global
Product:	Natevba
Type:	Material
Sub Type:	Website
Classification:	

Certification Statement
We certify that the final electronic form [...] rdance with the regulations set forth by the health authority for the country of thi[...] r and truthful presentation of the facts about the product.

Role	Signature
Andrew McWilliams - Legal Counsel - Legal Approval (andrew.mcwilliams@sc20.com)	Meaning: As the Legal, I approve this document for use. Date: 27-Jun-2022 10:23:40 GMT+0000

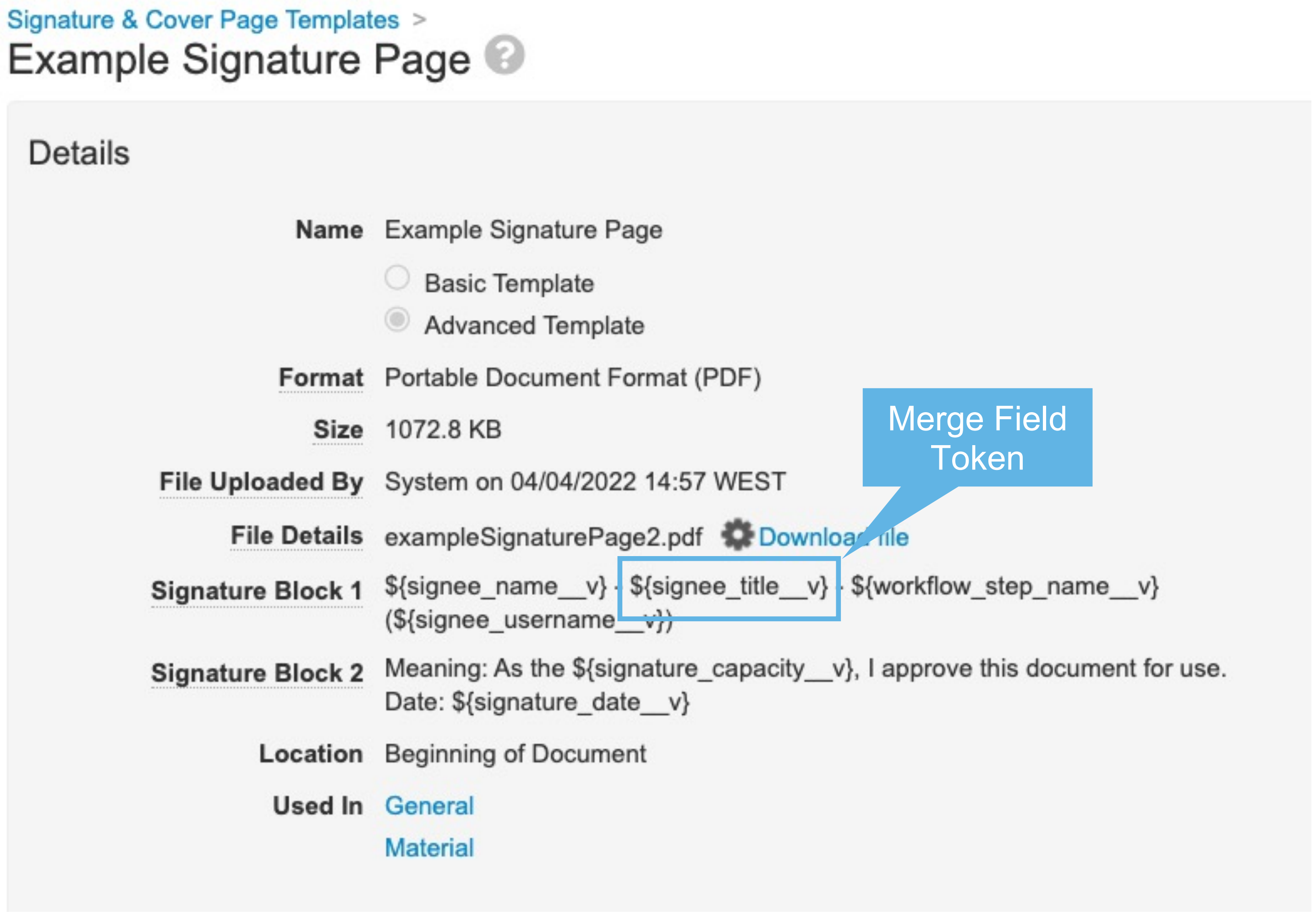
Overview

- Signatures captured after 22R2 will preserve the signer’s title at the time of signature each time the page is regenerated
- Signature pages are generated upon the first view of the page and after a new signature is captured
- If a delegate user adds the signature, their name and title also reflect the values from the time of signing

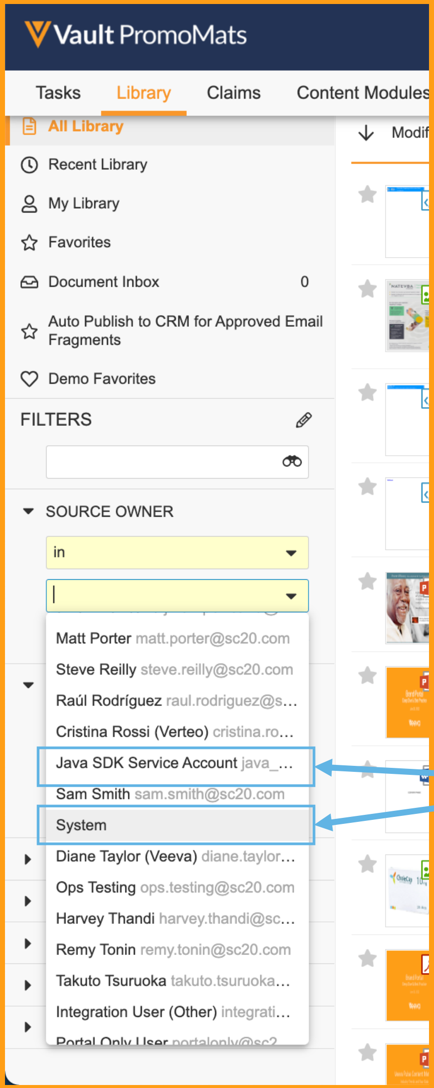
Preserve eSignature Page Signer Info

- Considerations
  - The *${signee_title__v}* merge field token must be included in the signature block of each signature template to reflect the title on the generated page

- Learn more about [Signature Page Templates]()



Display System-Managed Users in Search & Filters



System-Managed users showing in search filter for Source Owner in the Library

Overview

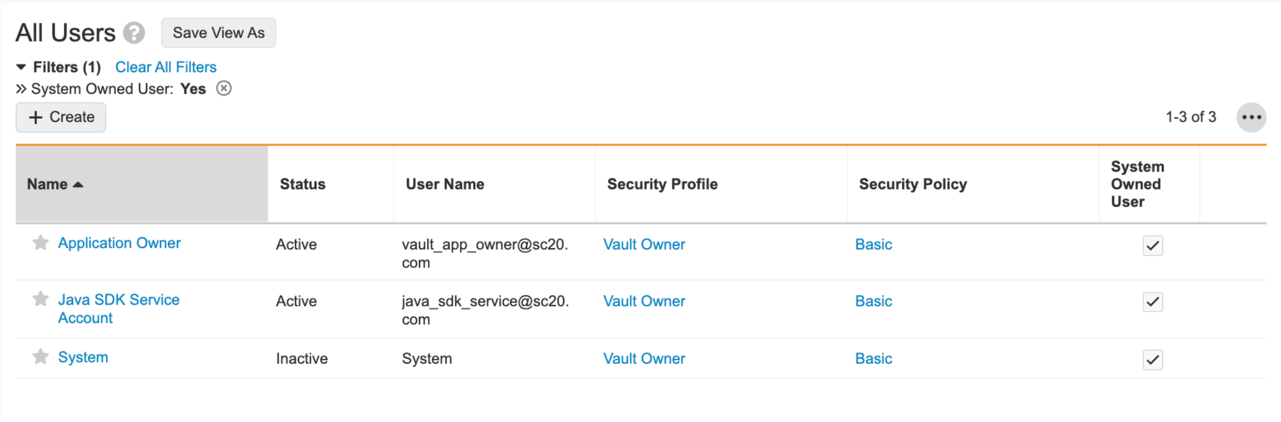
- Standardizes how these System-Managed users are exposed in Vault UI's:
  - System-Managed users no longer appear when selecting user for the purpose of data entry (Documents, Objects records, Configurations)
  - System-Managed users are included when selecting users for the purpose of search or data filtering (i.e. Selection of users in Search or when Filtering Audit logs or Reports)

Business Justification

- System-Managed users are now exposed in a very consistent way in the UI

Display System-Managed Users in Search & Filters

- Details
  - System-Managed users consist of:
    - Application Owner
    - Java SDK Service Account
    - System



All Users | Save View As

Filters (1) Clear All Filters

» System Owned User: **Yes**

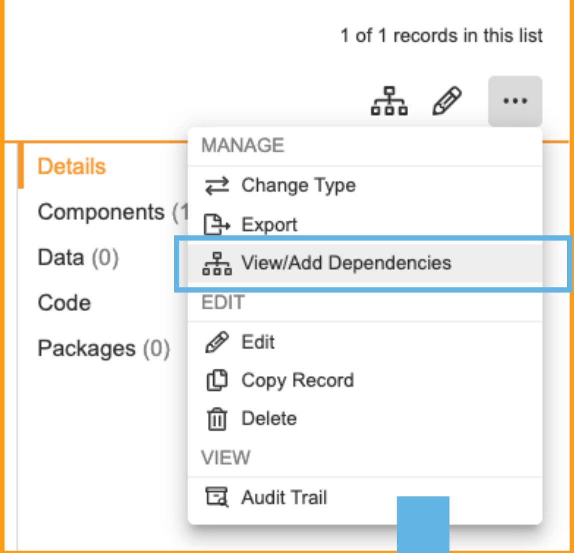
+ Create | 1-3 of 3

Name	Status	User Name	Security Profile	Security Policy	System Owned User
Application Owner	Active	vault_app_owner@sc20.com	Vault Owner	Basic	✓
Java SDK Service Account	Active	java_sdk_service@sc20.com	Vault Owner	Basic	✓
System	Inactive	System	Vault Owner	Basic	✓

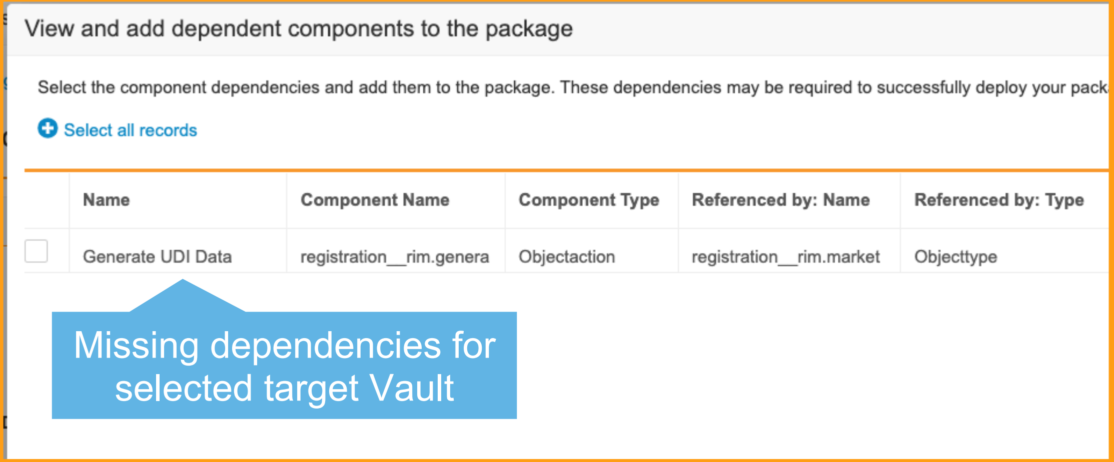
- Considerations
  - “Manager Groups” are no longer created for System-Managed user
  - System-Managed users cannot be used to create a cross-domain user
    - Enforced in UI and API

Admin & Configuration

Outbound Migration Packages: View & Add Dependencies



View/ Add Dependencies in Action Menu on Outbound Package



Missing dependencies for selected target Vault

Overview

- Allows for verification if an outbound VPK has all required interdependent components for deployment
- View dependencies and blocking components

Business Justification

- Improved deployment & preparation
- Less issues when importing or deploying a VPK
- More reliance on the system to highlight dependencies vs. requiring the full configuration knowledge

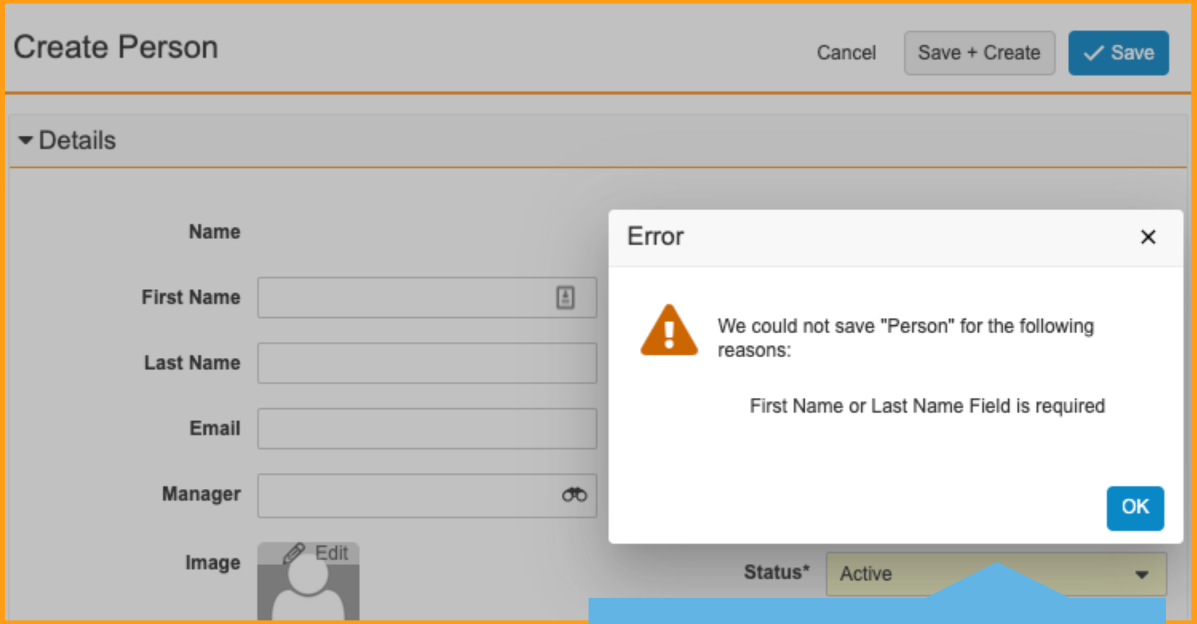
Outbound Packages: View & Add Dependencies

- Details
  - Admins will be able to select one target Vault for the outbound package
  - Target Vaults can be either parent Product Vaults or parent/sibling/child Sandbox Vaults
  - Using an action on the outbound package, admins will be able to view interdependent components
  - When viewing dependencies with a target Vault selected you can track blocking dependent components, several levels deep
  - When viewing dependencies without a target Vault selected you can view all dependencies
  - From view dependencies dependent components can be added to the package

- Considerations
  - Outbound packages need be enabled to use this functionality
  - Only migration packages are supported, data packages are not supported
  - Only one target Vault can be selected
  - A maximum of 2000 dependent components is listed

- Learn more about configuration migration packages

Person: First Name or Last Name is required



Error message will request user to fill in either First or Last Name if both fields are left blank

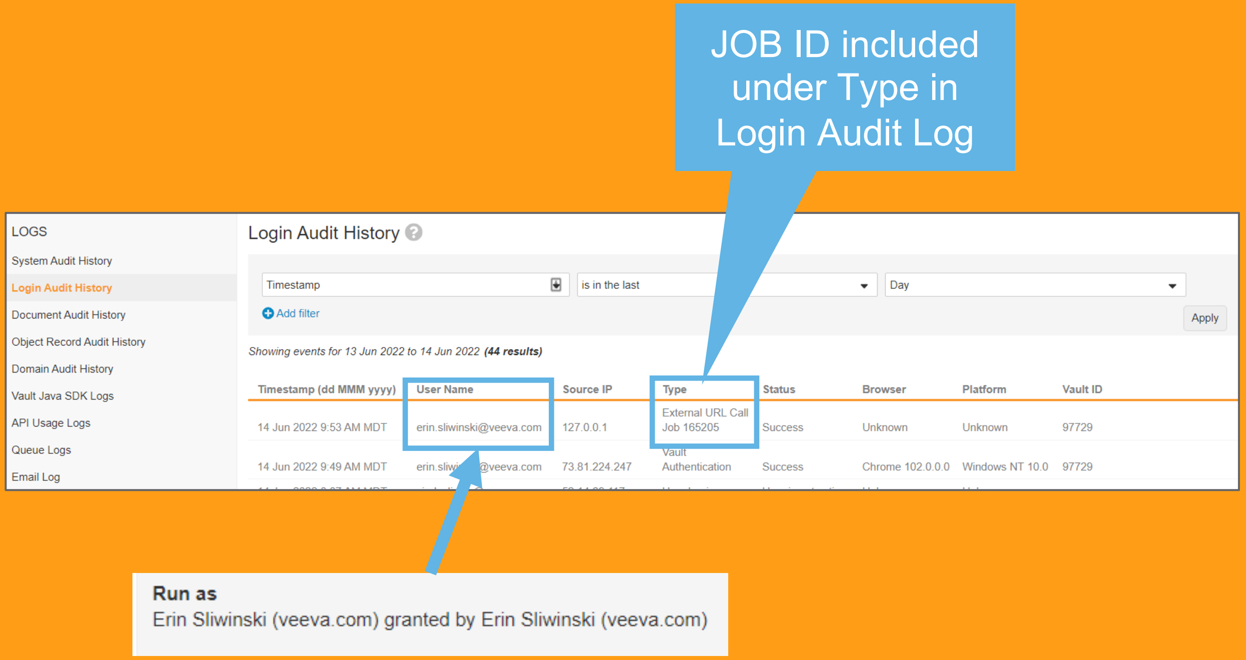
Overview

- When creating a person record in the person object, either the First Name or the Last Name is required – only newly created person records are affected

Business Justification

- With this change more diverse person use case can be supported, where either only the First Name or Last Name is known.

Jobs: Audit Logs for External URL Call Jobs



Overview

- Audit log entries for External URL call jobs now contain the User Name configured as the Run As user for the job
- The Login Audit entry now includes the Job ID

Business Justification

- Showing the username on the Audit Log for external URL calls provides visibility into seeing who owns the jobs that are being run
- Including the Job ID on Login Audit Logs allows admins to easily trace back to the Job in Vault

- Learn more about configuring job definitions

Vault Loader

Vault Loader: Trailing Zeroes Included in Extracts for Number and Currency Fields

	A	B	C	D
1	name__v	item_number__c	cost_usd__c	local_currency__sys.name__v
2	Event boards	1911.1300	94.20	USD
3				
4				
5				
6				

Overview

- CSVs exported from the Vault Loader UI and Command Line tool (CLI) will now contain trailing zeroes for number and currency fields
  - E.g. 94.2<u>0</u>

Business Justification

- Previously, the Vault Loader extract was trimming trailing zeroes for number and currency fields

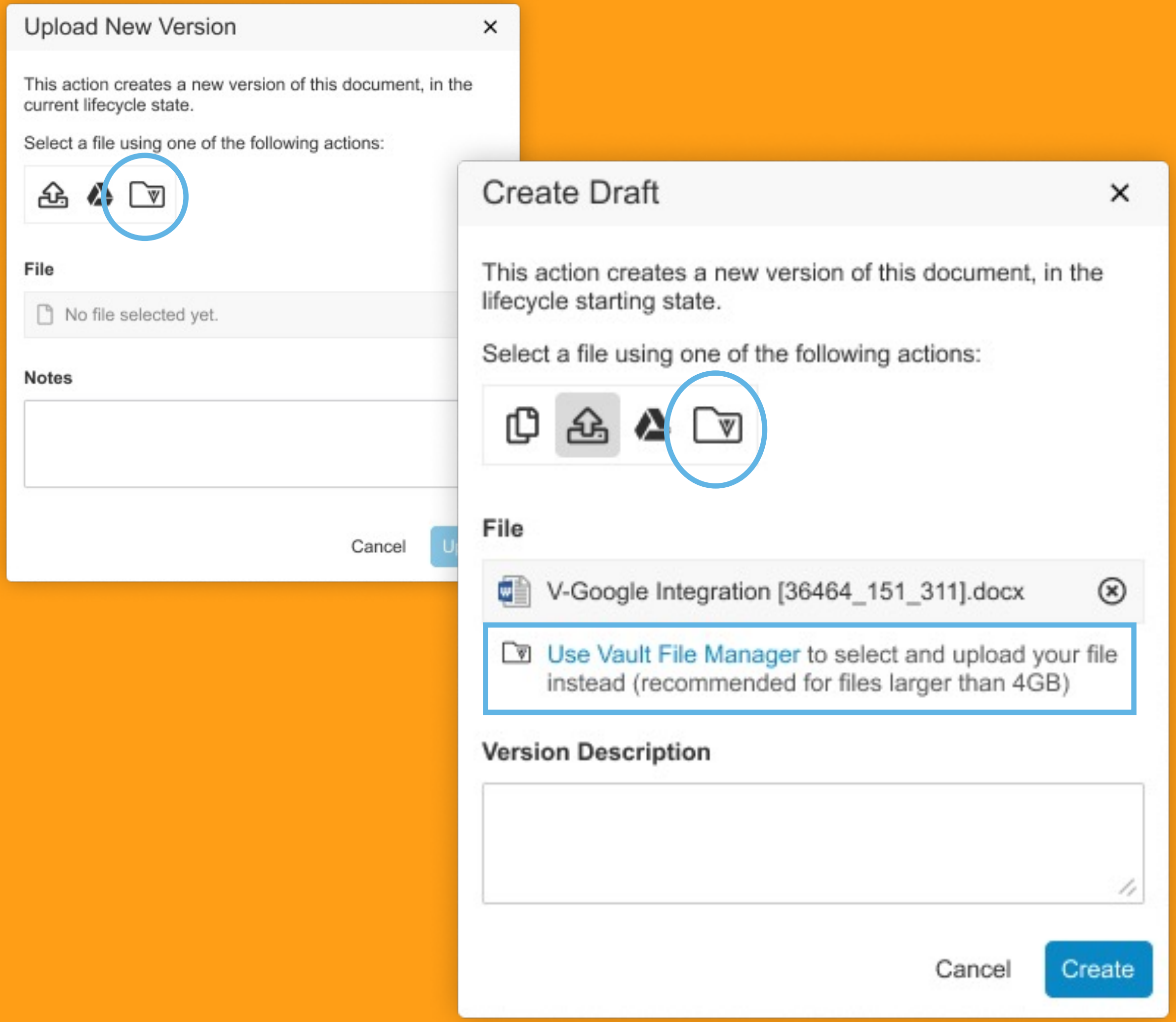
Considerations

- Does not apply to reports exported as CSVs from the Reports section
- Potential impact on downstream systems if precision and scale are set on target fields

- Learn more about [Vault Loader]

Vault File Manager

Upload Source Files Using Vault File Manager



Overview

- Vault File Manager now supports uploading source files of up to 100GB
- Users have the option to upload via Vault File Manager when they attempt to upload new version, create new draft, or upload to placeholder in Vault

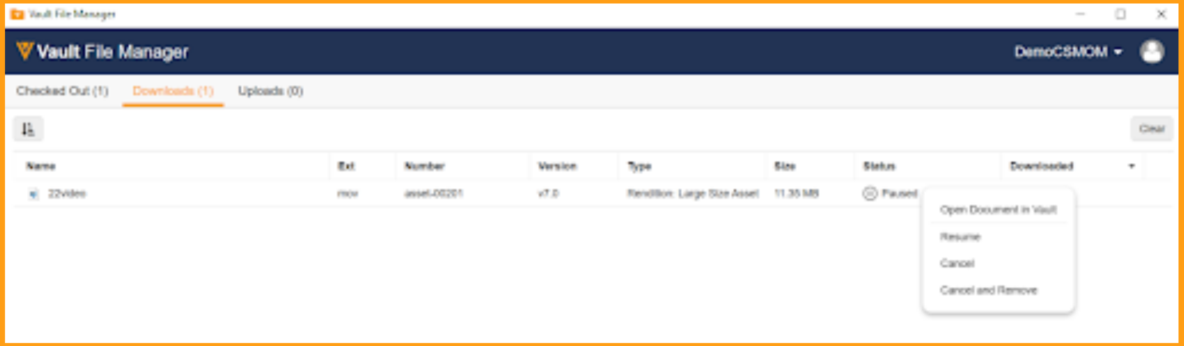
Business Justification

- The file size limit when using the web browser remains at 4GB, so we have enhanced Vault File Manager to handle these large file uploads
- This enhancement is ideal for DAM customers who need a non-FTP replacement for uploading large files to their Vault documents

Upload Source Files Using Vault File Manager

- Details
  - A new “Upload using Vault File Manager” ribbon button in the Create Draft, Upload New Version, and Upload File to Placeholder dialogs
  - Vault suggests to upload using Vault File Manager for files larger than 4GB
- Considerations
  - Users require Vault File Manager permission in their permission set
  - Users require Vault File Manger desktop application downloaded
  - Vault File Manager is only compatible with PCs
- Learn more about Vault File Manager

VFM Action UI Look and Feel



Overview

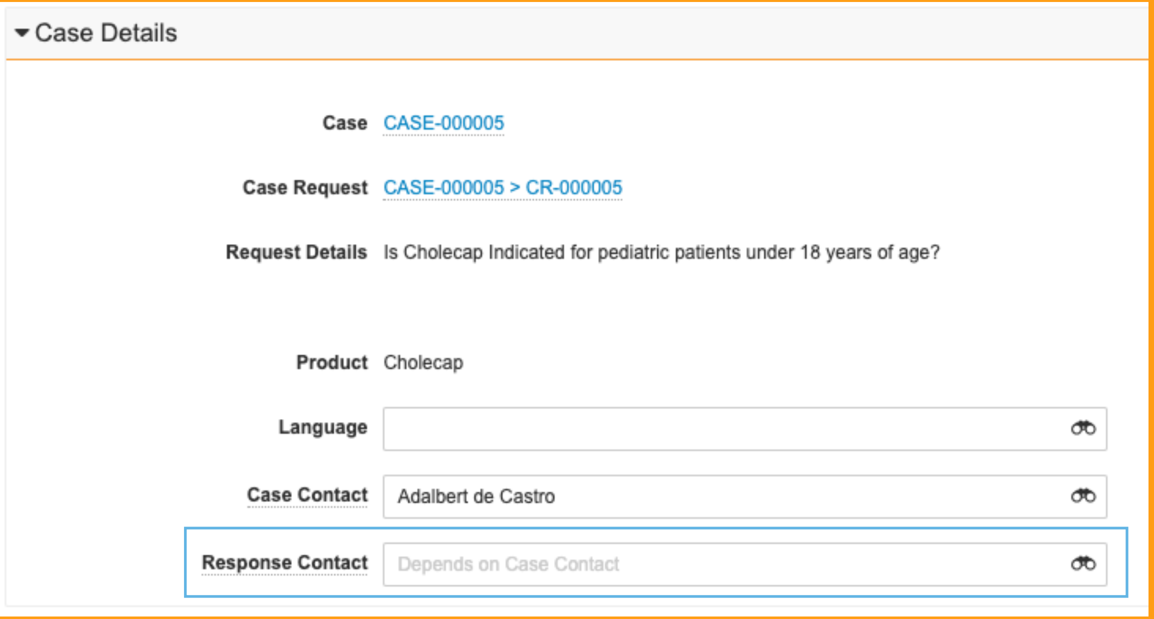
- This feature refreshes the Vault File Manager UI to align with the appearance of the Action UI in Vault
- These visual updates do not change any existing functionality and do not change the locations of common visual elements that users are familiar with

Business Justification

- Align user interface for consistency across all Vault related solutions

Medical Inquiry Management

Alternative Response Contact for Medical Inquiry Case Response



Overview

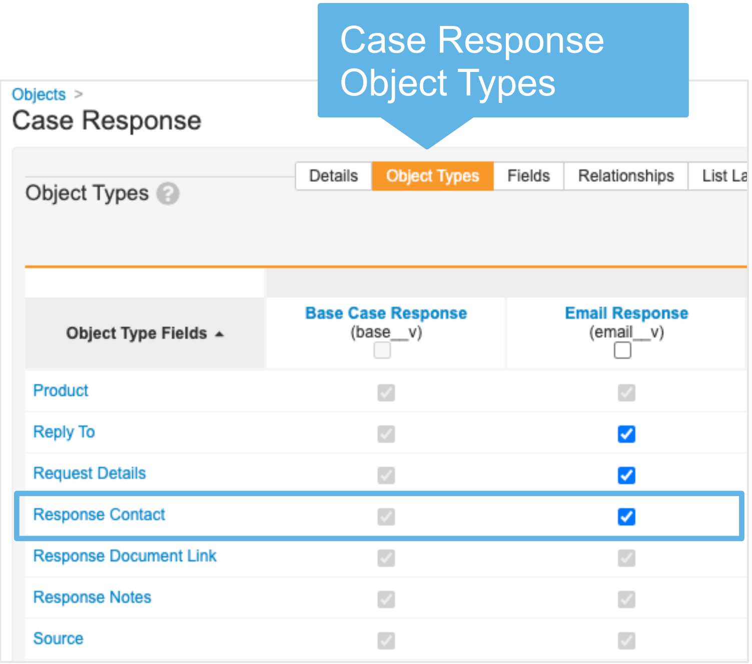
- This feature allows users to select an alternative recipient of case response emails in case the response should not go to the initial case contact for Medical Inquiry handling in Vault MedComms

Business Justification

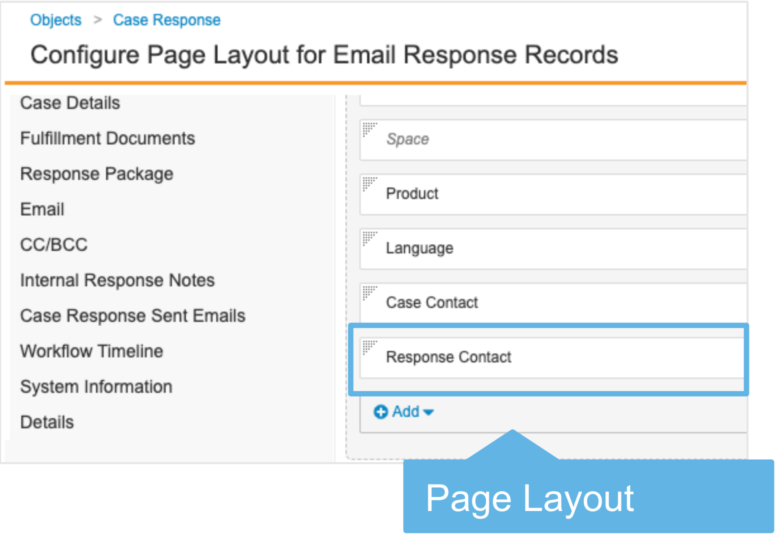
- Allows for sending of medical inquiry case response email to an alternate email address of the case contact

Alternative Response Contact for Medical Inquiry Case Response

- Details (Optional)
  - Case Response emails are sent to the Response Contact or if the field is left blank to the ‘Case Contact’ on the ‘Case Response’ object (and no longer the ‘Case’ object)
  - With the 22R2 release, the ‘Response Contact’ field has been added to the ‘Case Response’ object in your MedComms Vault
  - Admins need to add the new ‘Response Contact’ field to the ‘Email Case Response’ object type and page layout in MedComms to leverage the capability



- Considerations
  - The ‘Response Contact’ field is configured by default to only allow selection of contacts which have been added to the ‘Associated Contacts’ section on the ‘Case Contact’ record. This constraint can be removed by an admin



MultiChannel

Auto Publish to CRM for Approved Email Fragments

Overview

- Automation of Email Fragment creation and publishing for CRM through new document fields and lifecycle entry actions
- Automatic sync between related piece/medical content and the email fragment

Business Justification

- Removes the manual process of locating the proper template and creating the email fragment resulting in quicker and less error prone email fragment to CRM publishing process

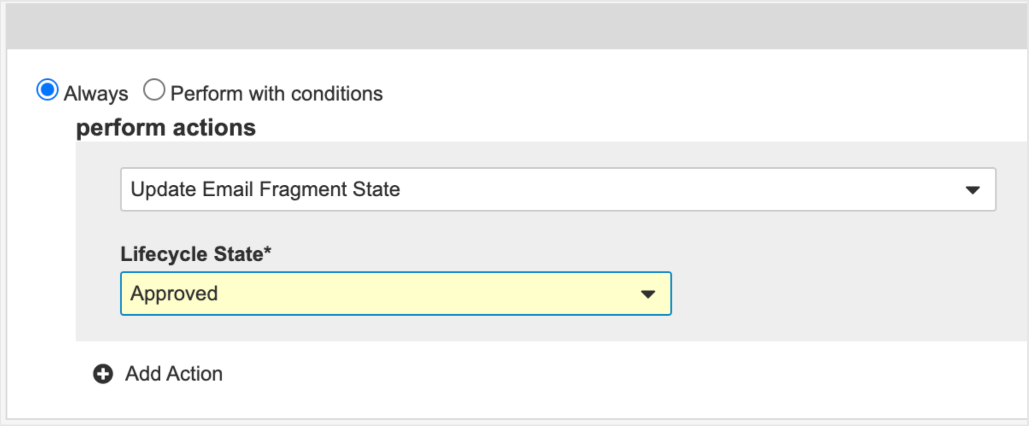
Auto Publish to CRM for Approved Email Fragments

- Details
  - The ‘Publish to CRM (Email)’ field controls whether a related piece/medical content should be shared with CRM as an email fragment – when set to ‘Yes’, Vault creates the respective email fragment based on an automatically selected email master fragment template. Once the email fragment reaches a steady state it will be published automatically to CRM
  - The email fragment master template used for the creation is selected automatically based on combinations of Targeted Document Type, Country, CRM Product, Product and Language field which admins can define on the master email fragment template

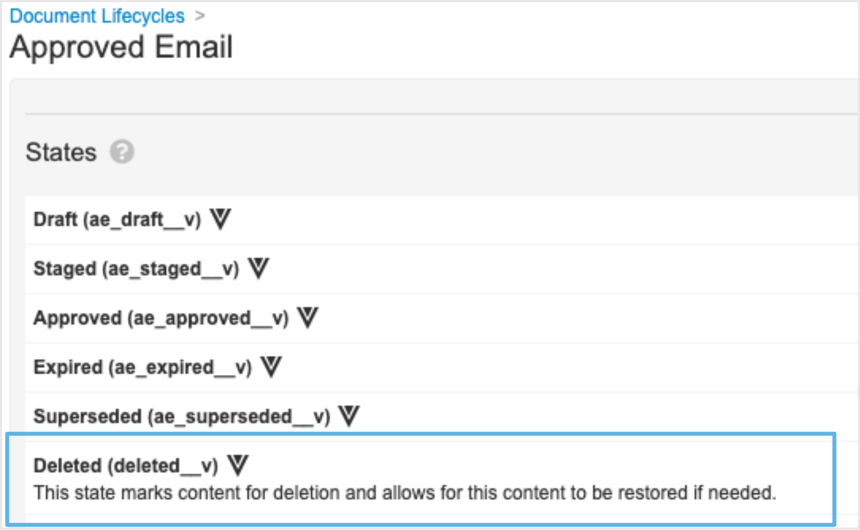
  - The email fragment remains in sync with the related piece/medical content for all fields that have been configured to allow for copy of values (have ‘Do not copy this field during Make a Copy’ checkbox unchecked) will update from the initial piece – an up versioning of your piece document also up versions the related email fragment
  - The previous manual process using user actions and manual template selection will remain available

Auto Publish to CRM for Approved Email Fragments

- Details
  - The newly added lifecycle entry action ‘Update Email fragment State’ will allow to update the email fragment state whenever the initial piece moves to another lifecycle state to keep the two in sync



  - A new 'Deleted' lifecycle state has been added to the Approved Email lifecycle. Automatically created email fragments will be set to 'Deleted' when the 'Publish to CRM (Email)' field is set to 'No" on the related piece / medical content.



Auto Publish to CRM for Approved Email Fragments

- Considerations
  - Admins need to enable the *Publish Approved Email Fragments for Veeva CRM* capability in the Application Settings of Veeva Vault to make use of the Auto Publish capability

  - The shared document field *'Publish to CRM (Email)'* needs to be enabled and added to the respective document types and field layouts in Veeva Vault.
  - Consider setting up entry actions for your lifecycle states of your related piece/ medical content in which the email fragment should also receive an update – that will allow to automatically publish the fragment to CRM once the initial piece reaches a steady state
  - In order to use 'Targeted Document Type' field as part of the metadata for email master fragment templates, the field needs to be activated on the email fragment master document type by an administrator
  - If the automated template selection detects multiple email master templates that match the criteria, an email fragment will be created for each applicable email fragment master template

Auto Publish to CRM for Approved Email Fragments

- Limitations
  - The steady state for email fragments require an expiration date. To allow for automatic population of the expiration date based on the source piece, uncheck the *'Do not copy this field during Make a Copy'* checkbox on the object field configuration – this will affect all documents using this field across Veeva Vault.
    In case you want to restrict the population of the expiration date for make a copy documents, you can leverage event actions to remove any values from the expiration date field upon for the Make a Copy user action.

- Learn more about Approved Emails

Packaging of CLM Content on CDN (Engage Share)

- Overview
  - Adds content for CLM on staging/production CDN environments in both zipped and unzipped formats where previously it was just zipped
  - Same behavior as Engage

- Business Justification
  - Supports an upcoming CRM feature for reps to be able to send links and stream content outside the CRM application

Resources

Resources

- Contact your Customer Success Manger or Managed Services Consultant
- Email: VaultCustomerSuccess@veeva.com
- 22R2 Release Kit: https://www.veeva.com/products/medical%20suite%20release/
- 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/

Thank you

Appendix

Platform Data Model Changes

- The following component was added to the Platform data model to support new features:
  - Added the Target Vault (target_vault__v) field to the Outbound Package (outbound_package__v) object to support the Outbound Packages: View & Add Dependencies feature

Commercial Data Model Changes

- The following changes were made to MedComms and PromoMats Vaults to support the **Packaging of CLM Content on CDN (Engage Share)** feature:
  - Added the shared field *Publish for Veeva CRM (Remote CLM)* (publish_for_veeva_crm_remote_clm__v)
- The following changes were also made to MedComms and PromoMats Vaults:
  - Added the shared field *Publish for Veeva CRM (Web link)* (publish_for_veeva_crm_web_link__v)
  - Added object *CRM EM Event Configuration* (crm_em_event_configuration__v)
  - Added object *CRM EM Event Topic* (crm_em_event_topic__v)
  - Added document field *CRM EM Event Configuration* (crm_em_event_configuration__v)
  - Added document field *CRM EM Event Topic* (crm_em_event_topic__v)
- The following changes were made to PromoMats Vaults:
  - Relabelled the *PromoMats to RIM* connection as *RIM to PromoMats*
  - Relabelled the *PromoMats to RIM Connection* document type group as *RIM to PromoMats Connection*

Commercial Data Model Changes

- The following changes were made to PromoMats Vaults:
  - Added the Pre-Dissemination Review of Television Ads object record to the Promotional Material Document Type object
- The following changes were made to MedComms Vaults:
  - Added the Response Contact (response_contact_v) field

Commercial Data Model Changes

- The following changes were made to PromoMats and MedComms Vaults to support the **Auto Publish to CRM for Approved Email Fragments** feature:
  - Added the following shared document fields:
    - *Publish for Veeva CRM (Email)* (email_content__v)
    - *Targeted Document Type* (targeted_doc_type__v)
  - Added the *Deleted* (deleted__v) state to the *Approved Email* lifecycle
  - Added the *Language* (language__v) field to the *Country* (country__v) object

Commercial Data Model Changes

- The following changes were made to MedComms Vaults to support the **Data Agnostic MedComms to CRM Connection for Medical Inquiry** and **Network (OpenData) Connection to Look Up HCP Reference Data for Medical Inquiry** features:
  - Added the following fields to the *Case* (case__v) object:
    - *Last Modified in CRM Date* (crm_last_modified_date__v)
    - *Response Contact* (response_contact__v)
  - Added the *Response Contact* (response_contact__v) field to the *Case Response* (case_response__v) object
  - Added the *Connection* (connect__v) field to the *CRM Org* (crm_org__v) object
  - Added the *OpenData Healthcare Provider ID* (opendata_healthcare_provider_id__v) field to the *Person* (person__v) object
  - Added the *Veeva OpenData* (veeva_opendata__v) value to the *Source* (source__v) picklist

Vault Java SDK Service Account

- Overview
  - Custom Vault Java SDK code now executes as the new Java SDK Service Account
  - Audit trails now show custom events logged as **java_sdk_service@{domain} on behalf of {username},** instead of System

- Business Justification
  - Provide better transparency about execution of custom Java SDK code
  - Distinguishes changes made by custom code from changes made by out of box application code

- Considerations
  - Runtime behavior of existing code will not be impacted by this change, only the audit trail entries for custom events will display different

Vault Platform HTTP/2 Support

- Vault now uses HTTP/2 as the default protocol to optimize network performance
- This update enables faster page loads
- Although the older HTTP/1.1 protocol is supported, restricting to only allow HTTP/1.1 traffic is not recommended
- We strongly advise reviewing and updating any network configuration and browser policy to ensure HTTP/2.0 is allowed to take advantage of this update

Enhancement to Document Multi-Value Fields in Expressions

- Overview
  - Multi-select picklist and object fields on documents return all selected values when used in lifecycle and workflow expressions

- Business Justification
  - Prior to this release, Vault returned a single value, even when multiple were selected

Delegate Admin CSV Export Enhancement

- Overview
  - There is no longer a limit of 1024 Active Delegations when exporting Active Delegations (Admin > Users & Groups > Active Delegations)

- Business Justification
  - Improves Admin experience when needing to export larger list for the Active Delegations

- Learn more about Delegate Access