22R3 Vault Medical Release Education

December 2022

22R3 Key Dates

Dates	Event
October 31	(all PODs) Pre-release vaults available
October 31 – November 4	Validation package available on VeevaDocs **October 31**: System Release Memo **November 1**: Compliance Documents **November 4**: Executed OQs
November 16	**Technical Release Education** https://veeva.zoom.us/webinar/register/9316651680576/WN_p6CvmsKqQPqo6NZQuVA26A
November 17	**Medical Q&A Session** https://veeva.zoom.us/webinar/register/6516650720759/WN_FnbYAa5bTmq_pV-y3a6xaQ
November 18	Release to all limited release PODs and PODs PODs VV1-12, VV1-1069, VV1-1144 Vault *File Manager does not release at this time, and instead releases with the general release PODs*
December 2	Release to all general release PODs

Announcements

Veeva
COMMERCIAL SUMMIT
SALES • MEDICAL • MARKETING

28-30 November 2022
Madrid

FOUR ZONES

CRM Suite

Vault PromoMats & Vault Medical

Link

OpenData

DEDICATED MEDICAL SESSIONS

REGISTER NOW

Monday 28 November

18:00 - 20:30
Welcome Reception

Tuesday 29 November

09:30 - 18:00
Opening Keynote, Zone Keynotes, Sessions, Connects, Roadmaps, and Innovation Theaters

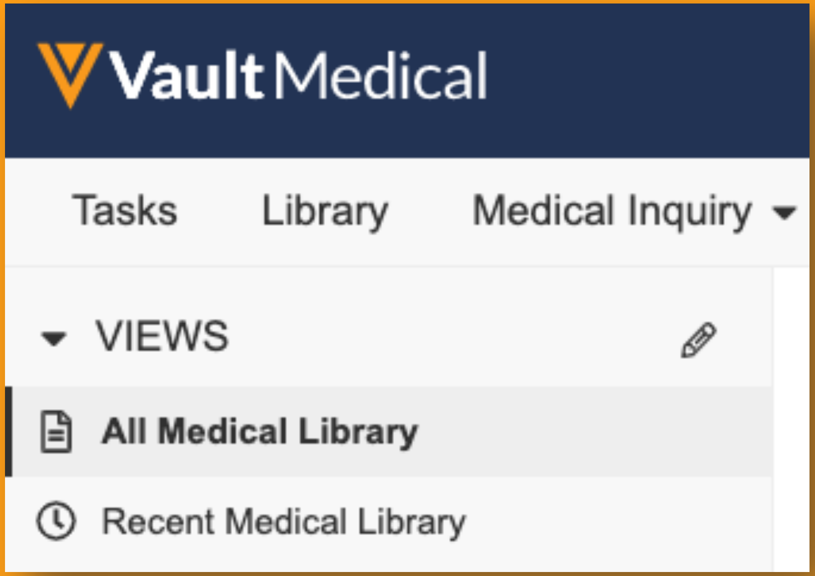
19:00
Evening Event

Wednesday 30 November

9:00 - 15:00
Forums, Sessions, Roadmap Repeats, Connects

veeva.com/eu/summit

Vault Medical



Overview

- Vault MedComms has been renamed to **Vault Medical** in 22R3
- Vault Medical will comprise 2 applications: **MedComms** and **MedInquiry**
- The two applications can be used independently of one another, or together
- Users can be licensed for one or both applications

Business Justification

- Both applications will now have a dedicated operating model and roadmap

Vault Medical

MedComms

Content management: Creation, review/approval, distribution

MedInquiry

Case handling: Intake, management, fulfilment

Vault Medical

MedComms User

- Create content
- Participate in workflows
- Consume content from Portals
- Distribute content to CRM & channels

MedInquiry User

- Create cases
- Search for content and assemble response packages
- Generate cover letters
- Fulfil inquiries by email and other channels

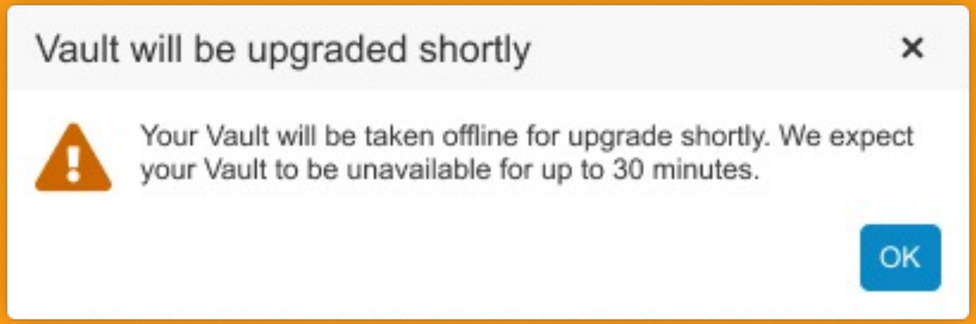
Vault Medical

Product Excellence

Customer Success

Focus

30-Minute Upgrade



Overview

- Production Vaults will be unavailable for approximately 30-minutes or less while being upgraded during a release
- Within 2 to 30 minutes prior to the Vault being unavailable, active users will be notified and have time to complete their work

Business Justification

- Shorter downtime reduces burden on users who need access to Vault
- Notification prepares users for the downtime

30-Minute Upgrade

- Details
  - Once a Vault has been upgraded, users will see a “What’s New” notification in the notifications area
  - An email will be sent to users subscribed to Service Availability Notifications
  - Sandbox Vaults will continue to be unavailable for the duration of the 4 to 6 hour maintenance window
  - Production Vault release downtime will be reduced to 10 minutes by 2023

- Considerations
  - If user has other Vaults available, they will be taken to vault they accessed most recently once they login and the Vault switcher shows unavailable vaults as disabled

Capture and Create New Documents

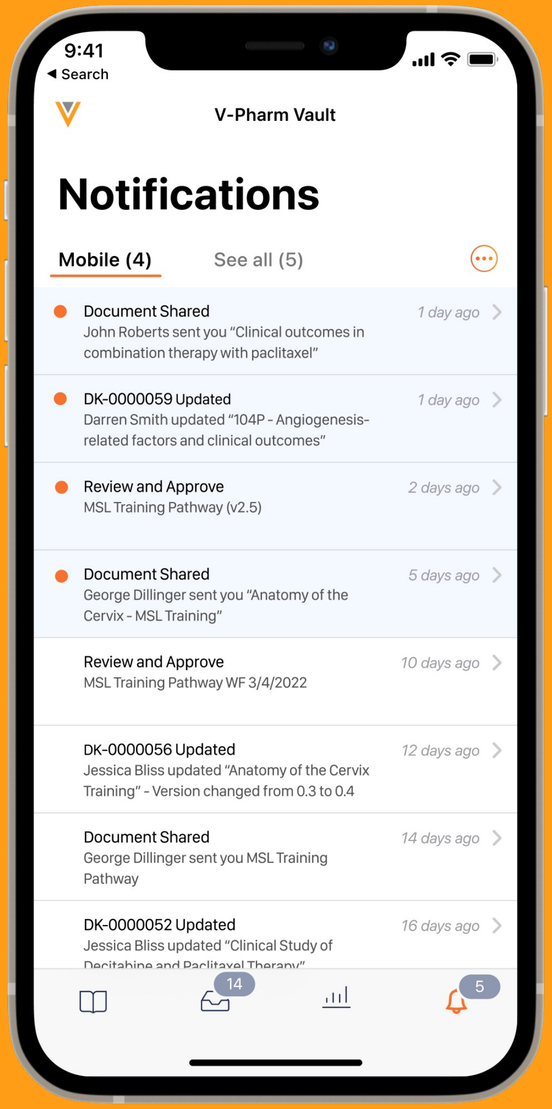
Overview

- Users can now use their phone camera to scan and create new unclassified documents via the Vault Mobile app

Business Justification

- Users may have paper documents that need to be scanned and uploaded into Vault
- This feature replaces the existing Veeva Snap mobile app functionality

View Notifications in Vault Mobile



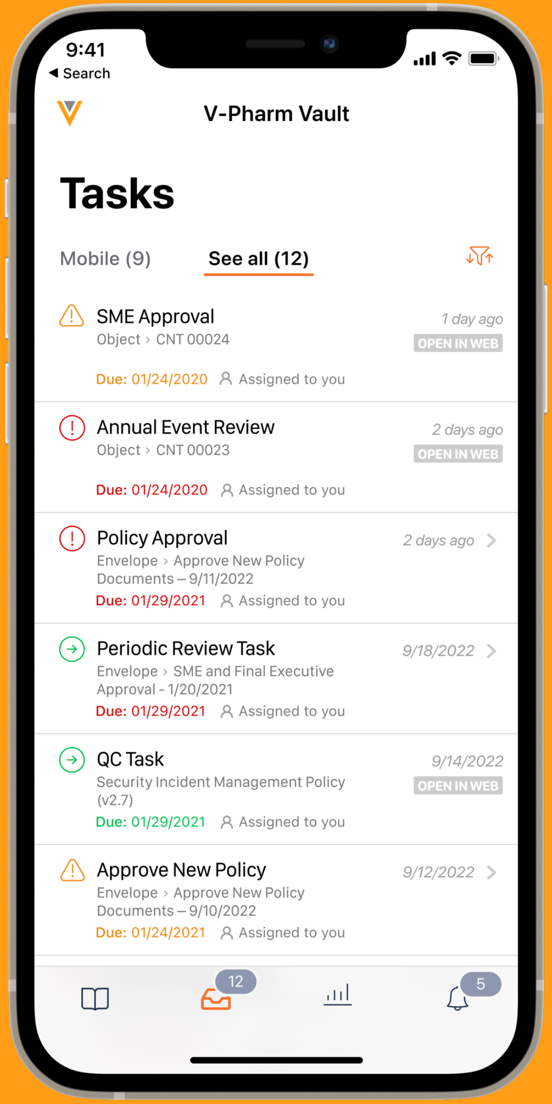
Overview

- Users can now view their notifications within the Vault Mobile app

Business Justification

- The new Notifications mobile tab makes it easy for users to access their notifications
- Users can switch between seeing all Vault notifications (mobile and Web notifications), and only mobile push notifications

View All Task Types in Vault Mobile



Overview

- The app now displays all tasks, not just OneWorkflow document tasks

Business Justification

- Previously, only OneWorkflow document tasks were displayed since those are the only tasks which can be completed in the mobile app
- To alleviate any confusion, Vault Mobile now displays all tasks in the app, and separates the tasks that can be completed within the app from the tasks which will require a browser

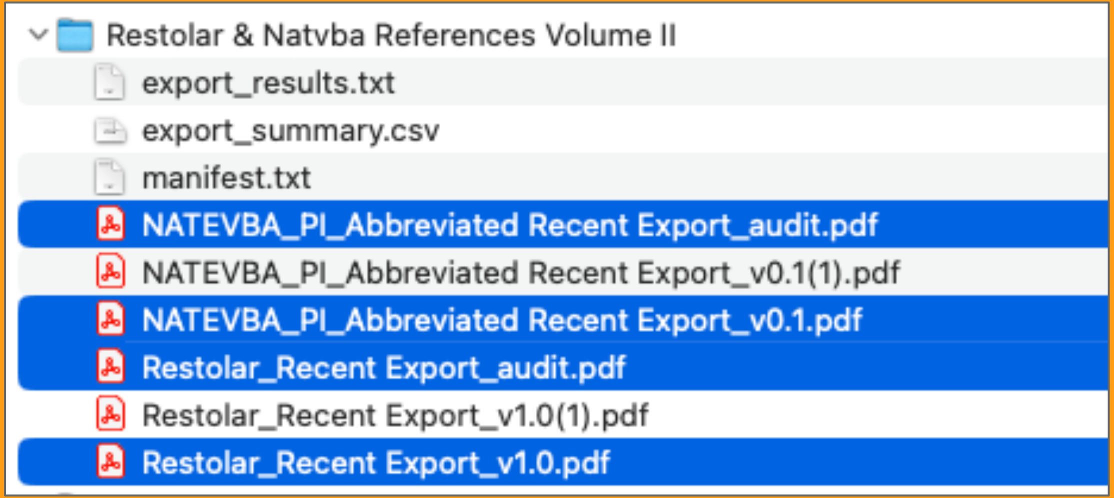
Document Content Reindex

- In preparation of upgrades to the Vault search engine, the content of all documents is being reindexed. Vault will add English stemming to document content search so that plural nouns, verb tense, and comparatives are automatically substituted
  - Reindexing for General Release PODs will begin on Dec 2nd and is expected to be completed by Feb 17th
  - Reindexing for Limited Release PODs began on Aug 18th and will be completed by early Nov
  - Both Sandbox and Production Vaults will get reindexed
  - Changes will not be immediately noticeable
  - Will result in more accurate search results due to the new OCR threshold

- Considerations
  - Older documents that have not been reindexed for a long time and need to go through the OCR process may have a different set of searchable terms based on the new OCR process
    - There maybe more or fewer searchable terms in those documents based on the old OCR confidence thresholds vs the new

Documents

Exported Binders: Audit Trail File Naming



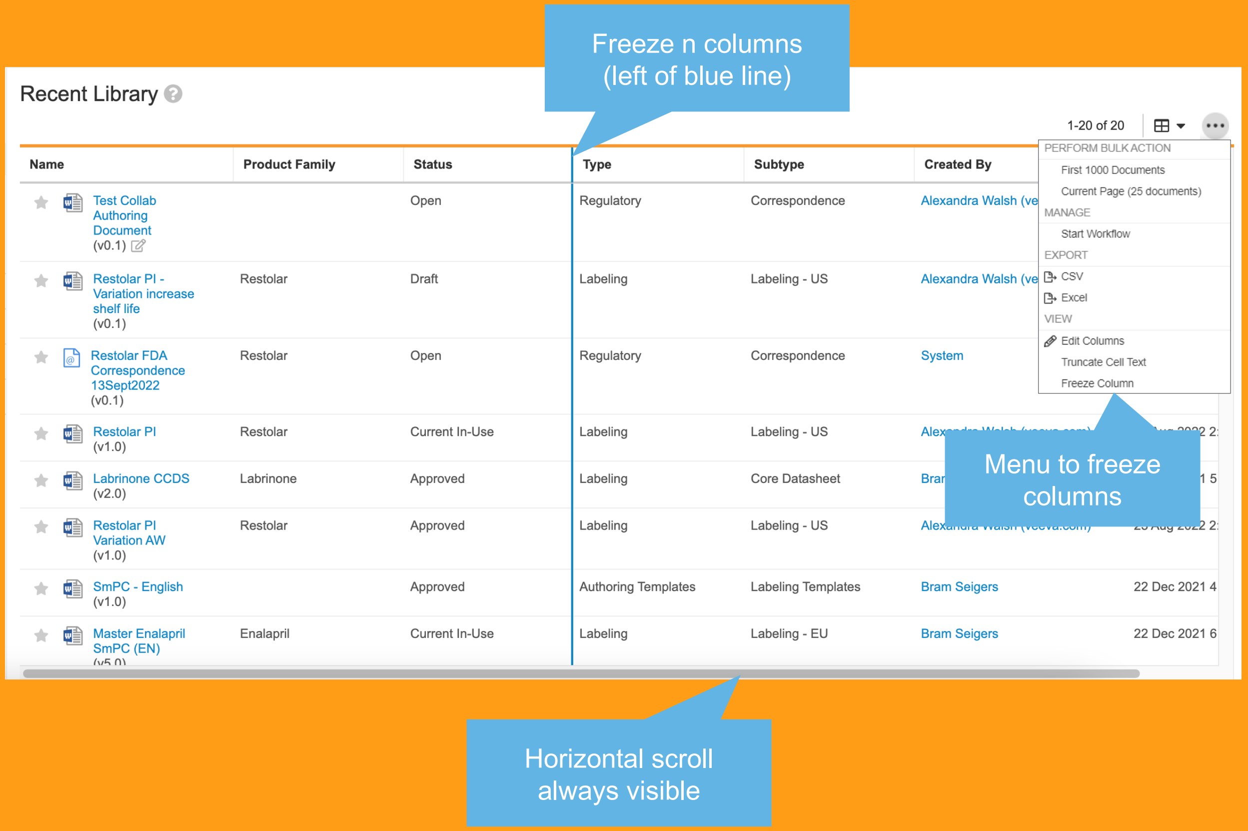
Overview

- Adjustment of binder audit trail file naming based to reference latest export version

Business Justification

- Previously, the audit trail file name for binders was based on the earliest export version.
- For consistency, moving forward the audit trail file name will always reference the latest export version

Freeze Headers & Columns in Document Grid Layout



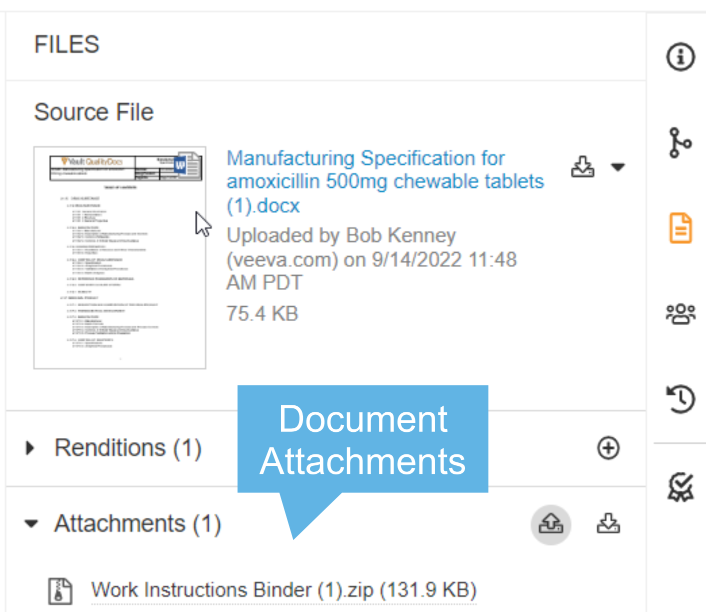
Overview

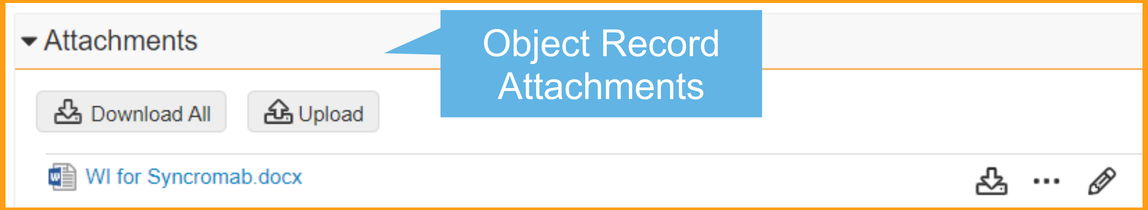
- Within the Library grid view, column headers are now frozen so that column names are always visible
- Users can freeze columns to make horizontal scrolling easier
- The horizontal scroll bar is automatically available without having to navigate to the bottom of your results first

Business Justification

- Makes navigation of documents in the Library grid view much easier

Suppressing Attachment Renditions on Single/Bulk Document/Object Records





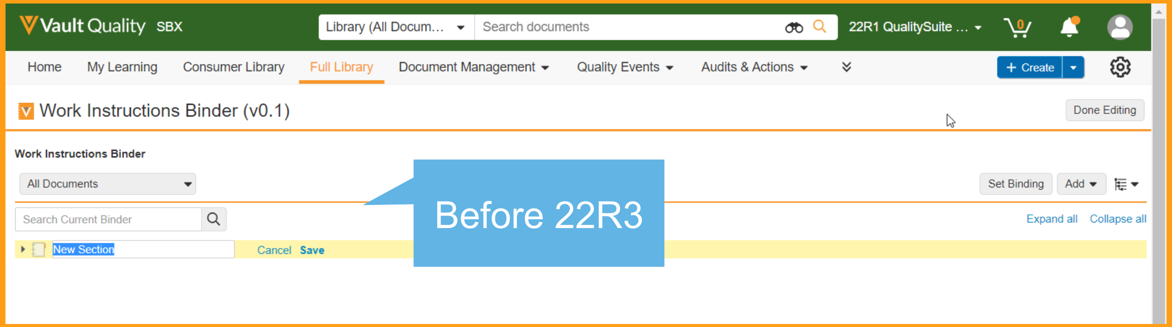
Overview

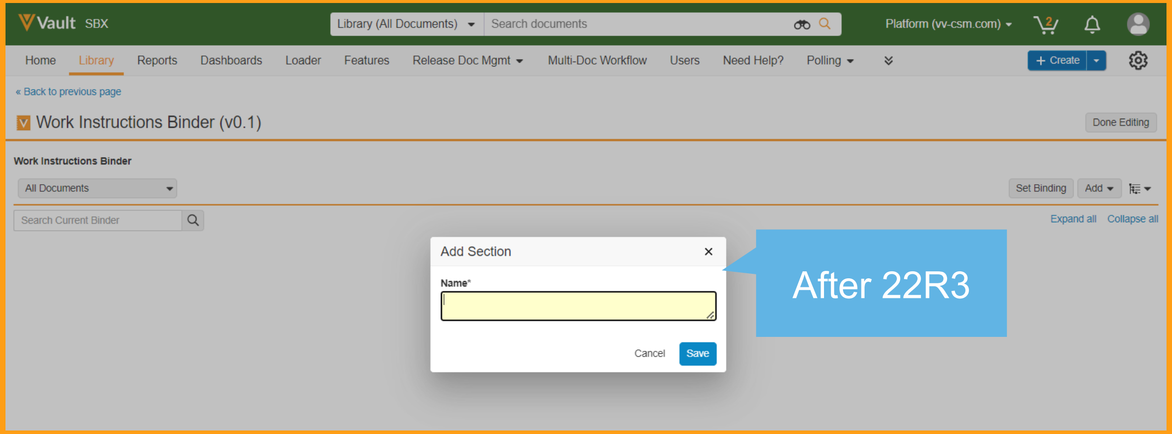
- Vault suppresses rendering the viewable rendition of attachments uploaded to documents and object records via code using the Vault API and Vault Java SDK
- Renditions created in this manner will be created on-demand, the first time a user navigates to the Attachments section of a document/object record and views an attachment

Business Justification

- Reduce the impact on the rendition server when large numbers of attachments are created in bulk, thereby improving user experience viewing documents and attachments

Adding Section to Binder in Outline View Confirmation Dialog





Overview

- When adding a section to a binder in Outline View, users now interact with a dialog to name and save the new section

Business Justification

- Creates consistency throughout the Vault user interface

OCR Extended Language Support

- Overview
  - Vault is extending Optical Character Recognition (OCR) support to include files containing non-English text. This feature allows users to override the initial OCR language selection.
    - Supported Languages include: Chinese (Simplified), Chinese (Tradition), Dutch, French, German, Hungarian, Italian, Korean, Japanese, Polish, Portuguese (Brazil), Portuguese (Portugal), Russian, Spanish, Thai, and Turkish
  - Previously, OCR (Optical Character Recognition) extracted and indexed text only in English. OCR now recognizes text in all languages that are supported in Vault

- Considerations
  - Significantly enhances Global end-users experience by providing OCR in local languages

- Learn more about OCR Extended Language Support

Document Related Configuration Setting Audit Trail

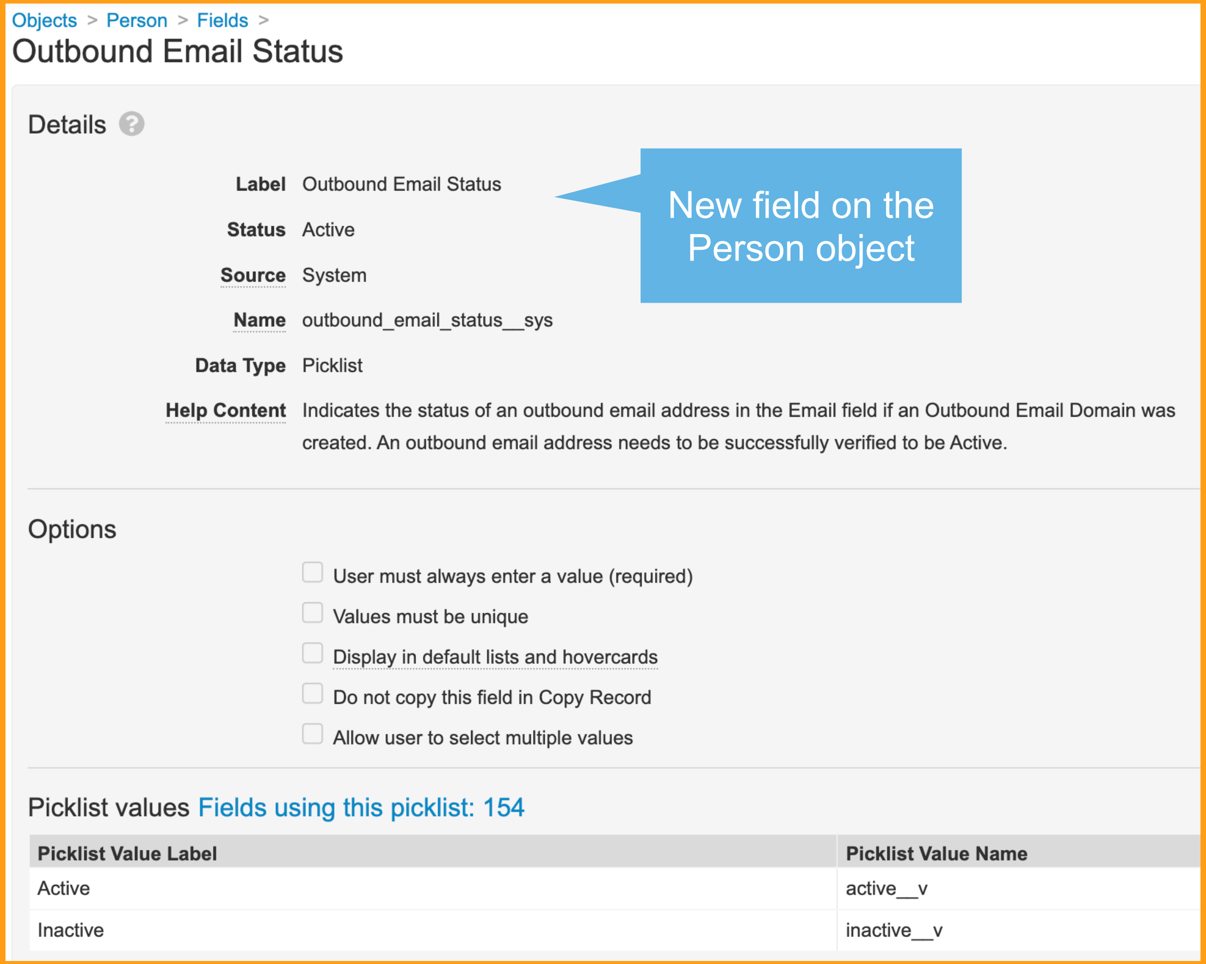
- With this enhancement, the following configuration settings for documents will have audit events that will display in the System Audit History:
  - Maximum characters for exported file name (including extension)
  - Maximum characters for exported folder name
  - Maximum characters for exported document path
- Previously the system was not tracking changes to these configuration settings, which was confusing for Admin users because other events were being tracked and recorded in the System Audit History

- Considerations & Limitations
  - None

- Learn more about Viewing Admin Logs

Objects

Outbound Email Address for Persons



Overview

- This feature will give apps the ability to allow their users to email from their own custom defined email addresses

Business Justification

- Allows customers to verify and define root domains and subdomains for distributing email from Vault
- Allows customers to distribute emails from many individual users

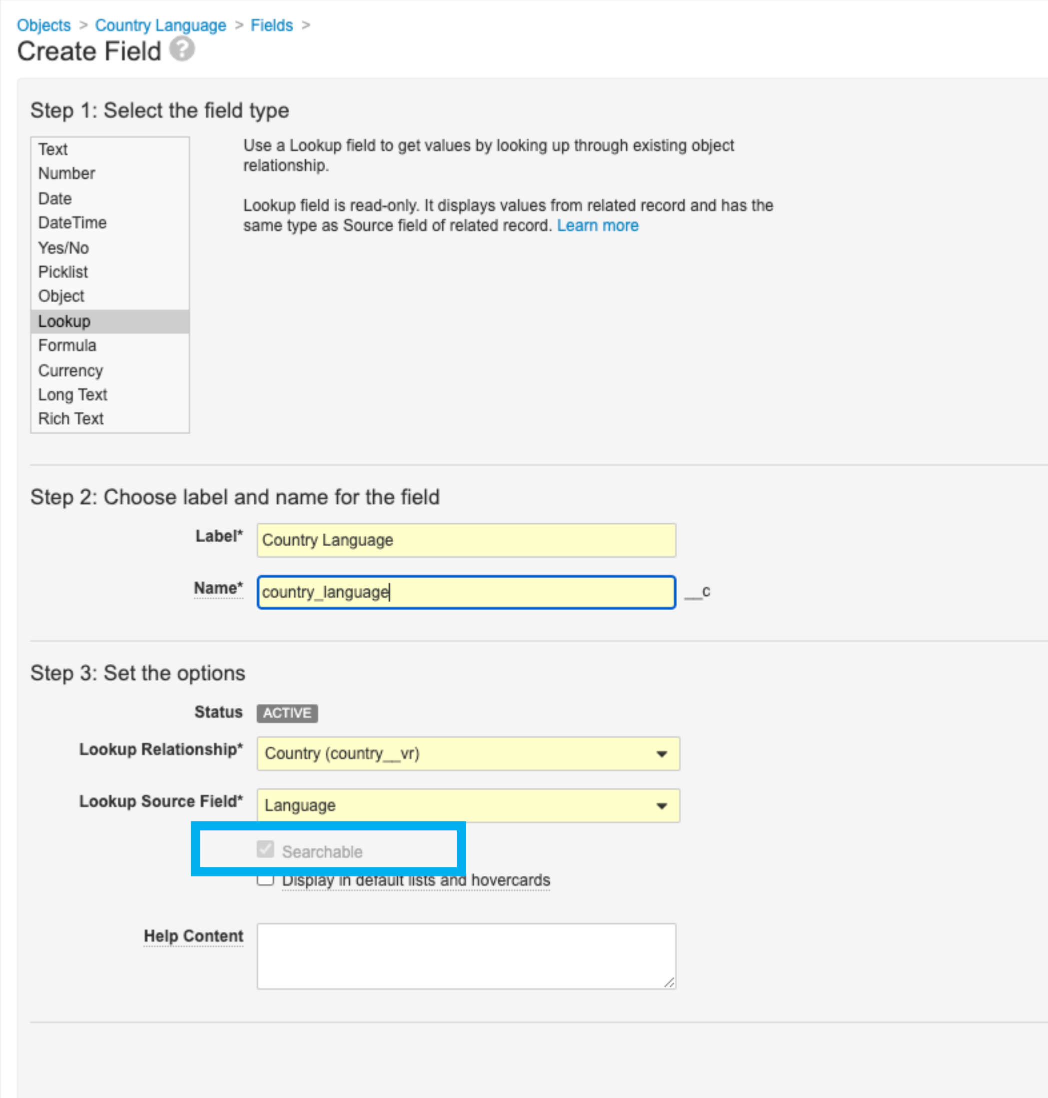
Outbound Email Address for Persons

- Details
  - Apps will be able to choose from either allowing their customers to define outbound email addresses directly on the base person record, or on a new person type
  - Admin can set the outbound email address in the Email field for the Person record
  - A system-managed field “Outbound Email Status” will be added to the base Person object
  - When the Email field has a domain that matches an Active and Verified Outbound Email Domain and the Outbound Email Status is not Active, a new user action “Verify Outbound Email” will be available
  - The email shall contain a link that must be clicked in order to activate Outbound Email Status

- Considerations
  - If the email address is changed, the Outbound Email Status will again become Inactive, and it must be verified again
  - This only applies to Vault Applications with Outbound Email Domains enabled (support enabled flag)

- Learn more about [Outbound Email Address]

Lookup Fields for High Volume Objects



Overview

- High Volume Objects (HVOs) now support lookup fields which was previously only available to Standard Volume Objects (SVOs).

Business Justification

- Customers with SVOs with lookup fields can now migrate to High Volume Objects as lookup fields are now supported

Lookup Fields for High Volume Objects

- Details
  - New attribute for lookup fields called ‘searchable’ will let you know if a lookup field is searchable
  - The following field types are supported as HVO lookup fields:

    - Text
    - Number
    - Date
    - DateTime
    - Yes/No
    - Object
    - Picklist
    - Currency
    - Long Text
    - Rich Text

- Considerations
  - Faceted Field Filters are not supported for HVO lookup fields
  - Supports filtering and sorting except for Rich Text, Long Text and text fields longer than 250 characters

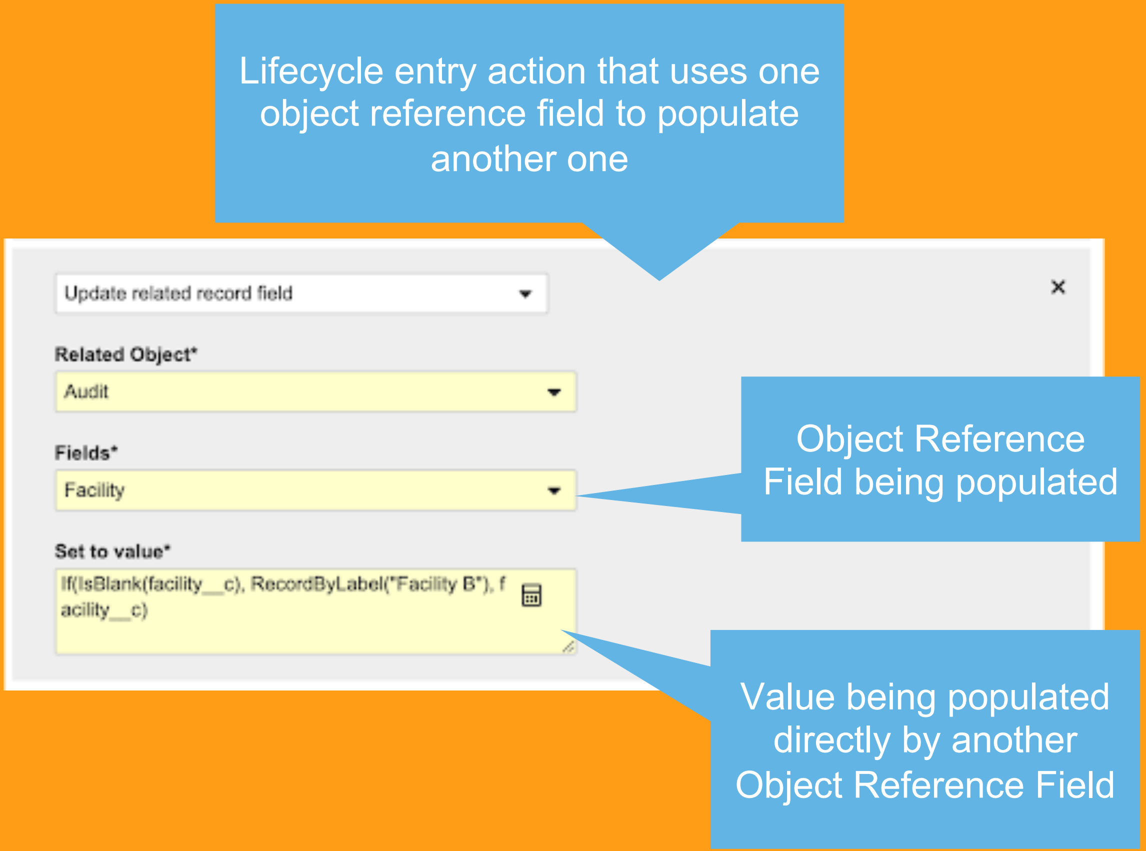
Lookup Fields for High Volume Objects in Reports

- Customer can report report on High Volume Object Lookup Fields similarly to what is available for Standard Volume Objects
  - Customers can apply conditional formatting by using the lookup fields
  - Can filter on all HVO lookup fields on Multipass Reports

- Considerations
  - Vault Reporting supports filtering on the HVO lookup field if the underlying field is searchable

- Learn more about [High Volume Objects]

Object Reference Fields in Expressions



Overview

- Object reference fields will now be available to be used in the expression editor
  - These fields can be used directly, such as using one object record to set the value of another object record
  - There are also two additional functions to allow you to use the text of the object record label or the record ID – Text() and ID()
- This change will only apply to objects that reference other objects, and will be available in object, workflow, and lifecycle expression use cases

Business Justification

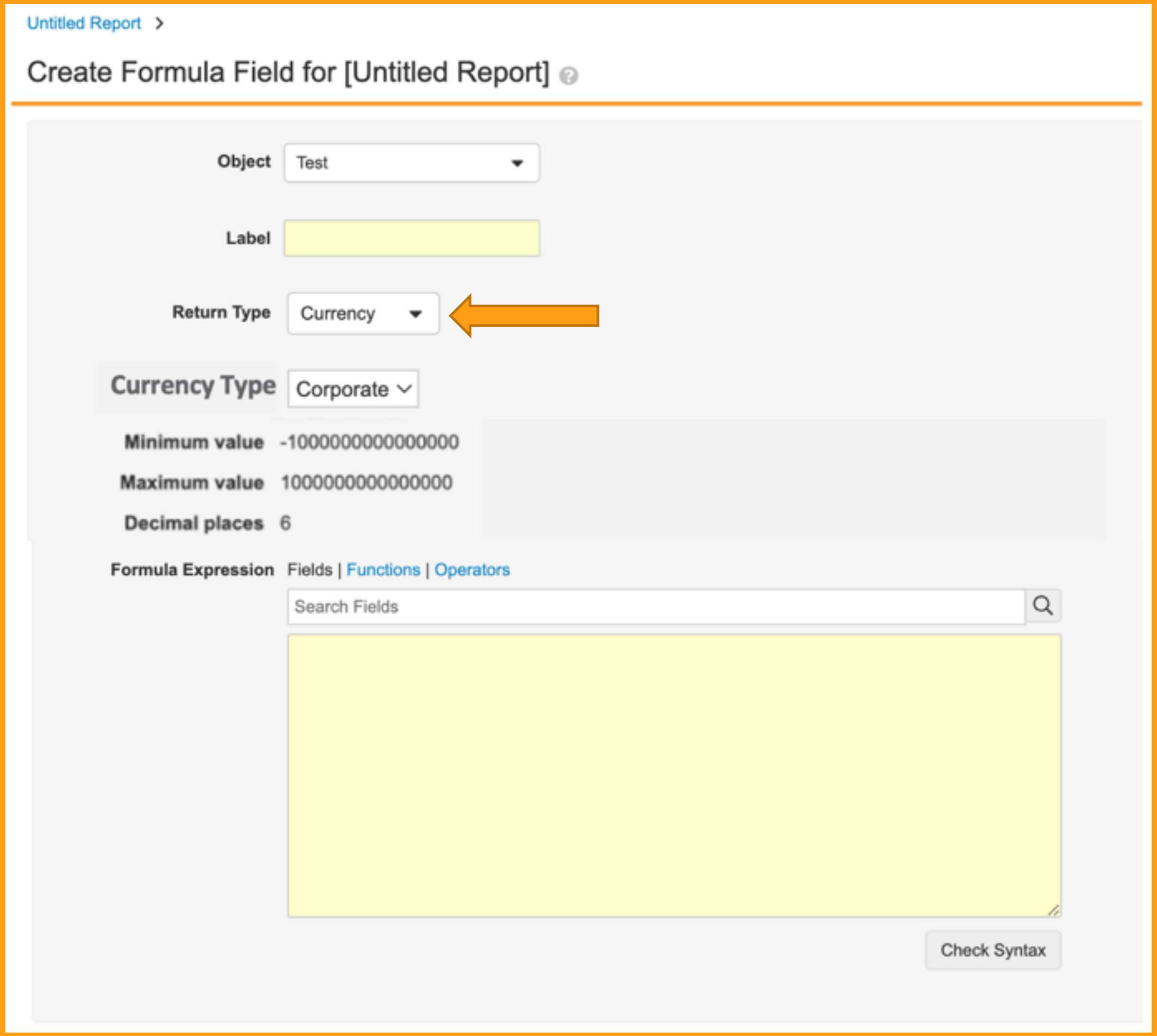
- Interacting with object reference fields will bring additional flexibility and functionality to Vault expressions

Object Reference Fields in Expressions

- Details:
  - Object reference fields have been available in expressions already, but the use was limited and the data returned was inconsistent. The data returned might either be the field ID as a string or the field label as a string
  - This change brings consistency allowing object reference field to be used directly, or the new additional functions can be employed to allow either the record label or ID to be used in the expression
    - ID() will return the ID of the record as text
    - Text() will return the label of the record as text

- Considerations
  - This feature only applies to objects which have a field that references another object, it does not apply to Documents that have a field which references an Object
  - This feature is not available in reports
  - Existing expressions that use object Reference Fields will be upgraded to avoid regression:
    - Existing expressions that return the record label will be updated to be wrapped in a Text() function
    - Existing expressions that return the record ID will be updated to be wrapped in an ID() function

Currency Formula Fields



Overview

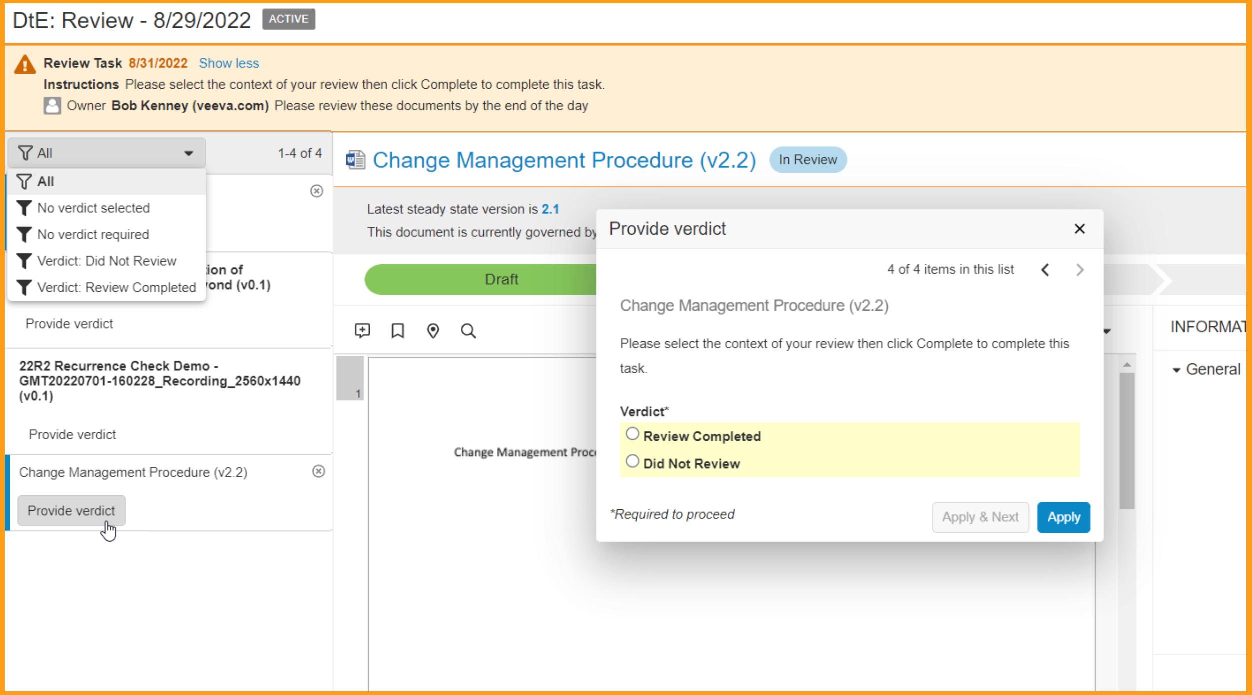
- This feature adds the formula field type, **currency**, to object formula fields
- Currency formula fields return numerical data formatted as a corporate or local currency

Business Justification

- Provides the ability to indicate local or corporate currency which is automatically created on the object

Lifecycles and OneWorkflow

Multi-Document Viewer UI Updates (for Workflows)



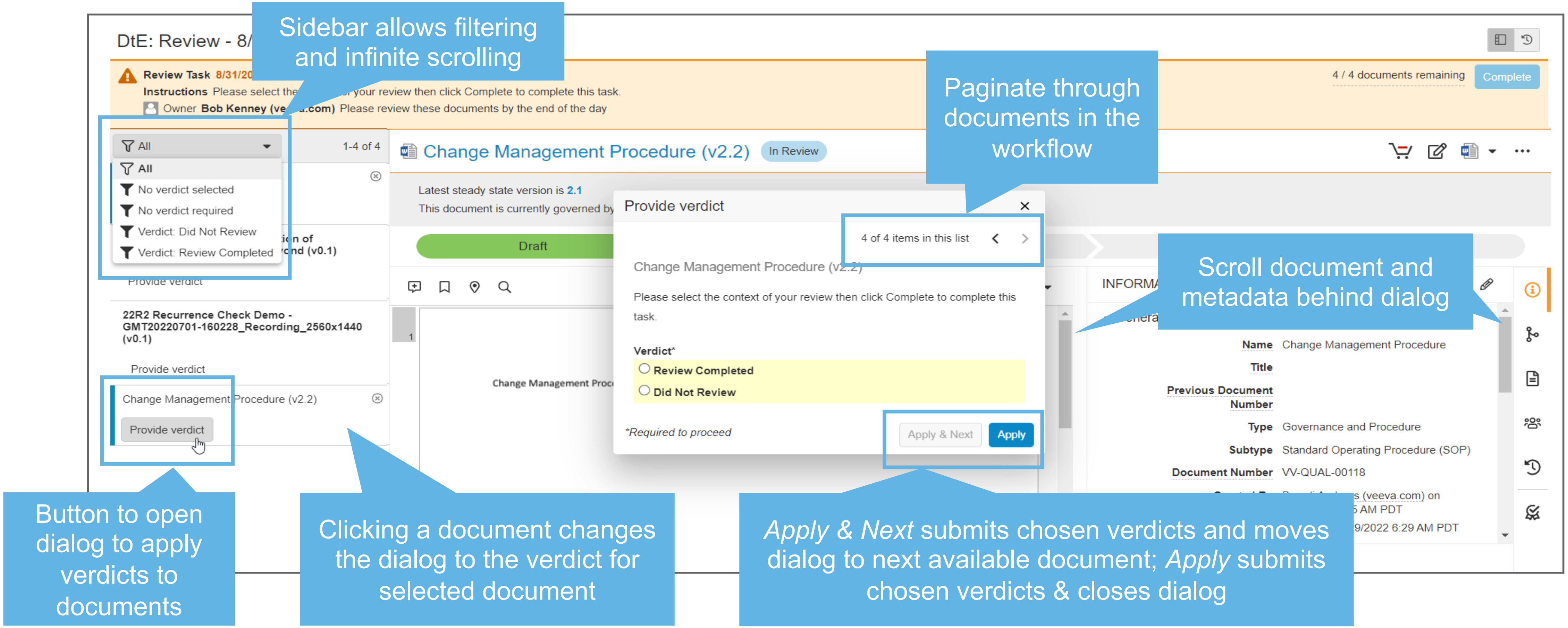
Overview

- This feature makes several user experience enhancements to the multi-document viewer screen for users completing workflow tasks (see next slide)

Business Justification

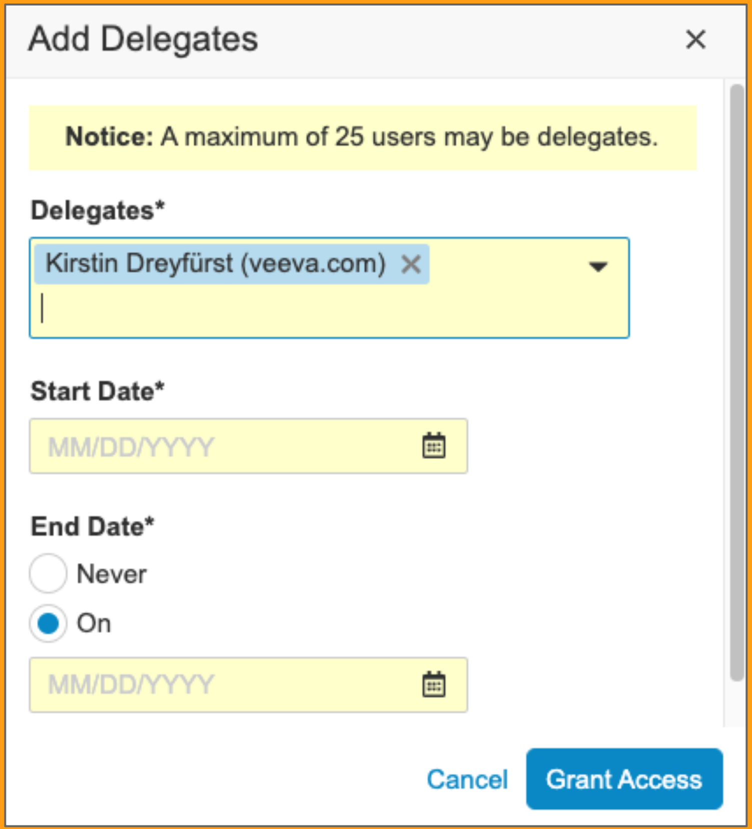
- Make it easier for workflow task participants to work with multiple documents

Multi-Document Viewer UI Updates (for Workflows)



- Considerations
  - Verdicts not applied will not be saved, and no warning provided when closing the dialog

Add Delegates to a User: Performance Optimization



Overview

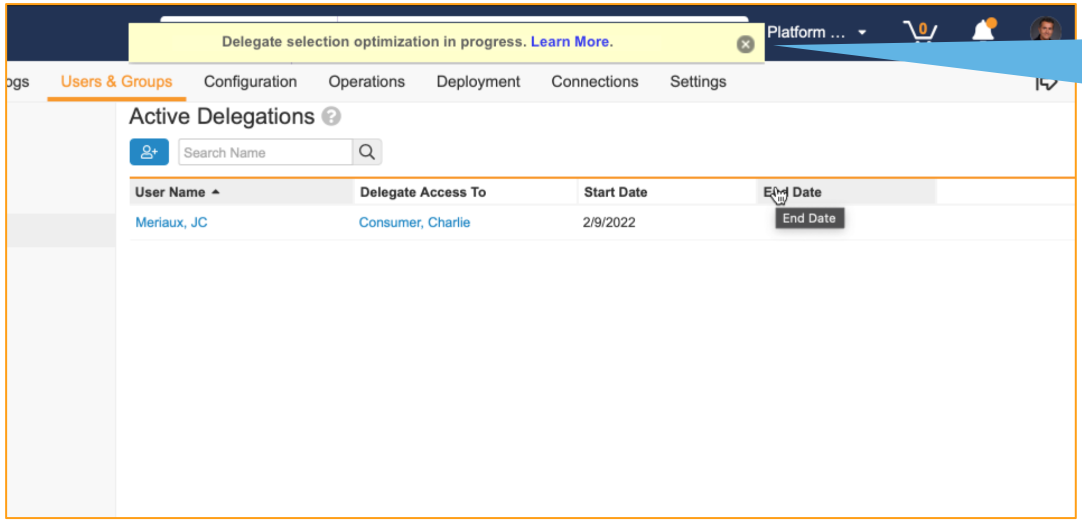
- This feature optimizes the performance of the user drop-down selection when adding new delegates by validating the user as being available as a delegate:
  - A banner is displayed to administrators on the Active Delegations page when optimization is in progress
  - A Hover message is displayed requesting a user be unselected if no longer able to be a delegate

Business Justification

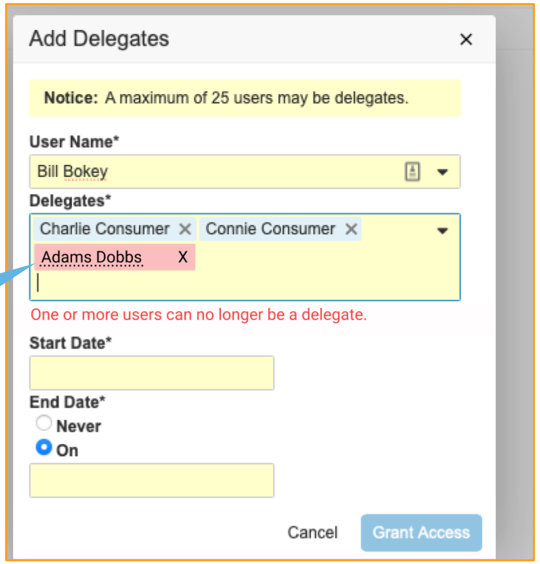
- Between the time delegate users are selected and the time the user clicks “Grant Access” there is a possibility that one or more selected users no longer have the delegation permission

Add Delegates to a User: Performance Optimization

- Delegate selection is used in three places: Admin > Active Delegations, Vault Users > Delegate section (including also Custom tabs and business admin), and User profile

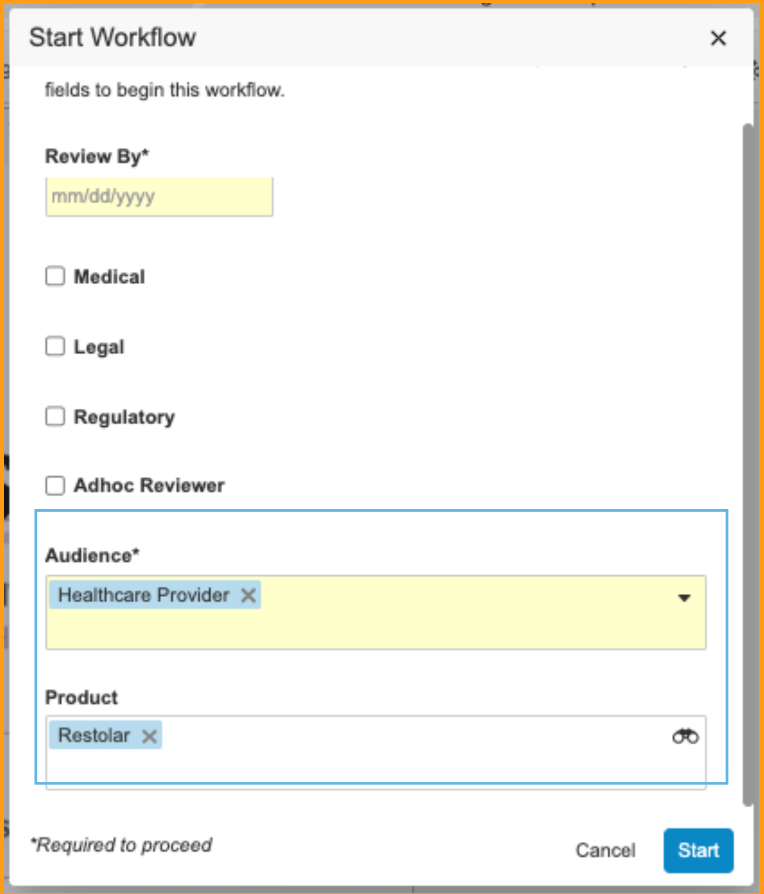


An administrator sees a Banner on the Active Delegation page warning that the "Delegate selection optimization is in progress. Learn More" ("Learn More" takes them to the Vault Help Page)



In the very rare occurrence of one or more selected users no longer having the delegation permission, the user is Warned that certain users cannot be selected (These users have a different pill color and hover message)
Note: In addition, the "Grant Access" button is made inactive, until all the 'red pills' are removed

Pre-Populated Values in Document Workflow Field Prompts



Automatic population when values are already present on related document

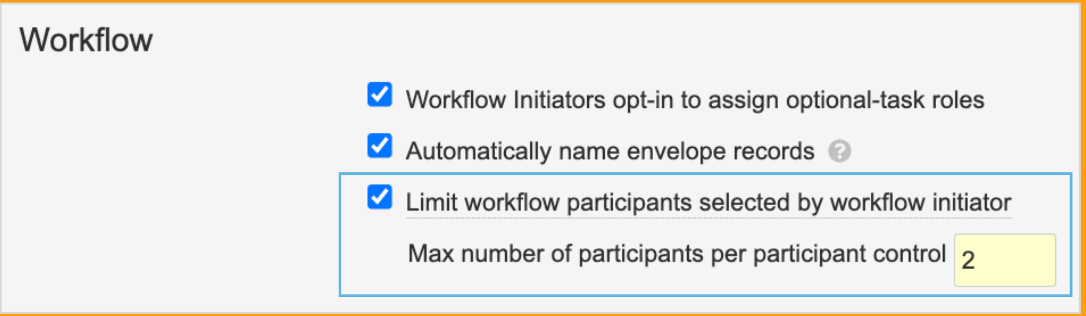
Overview

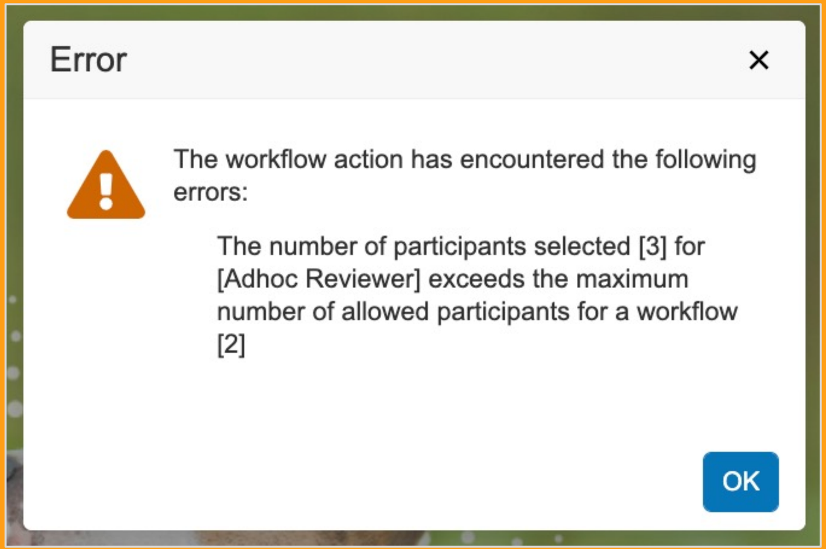
- Pre-populates document field values in Start and Task step field prompts and single verdict prompts in single document workflows. Requires values to be present in the related in the related document field.

Business Justification

- Reduction of data entry steps while easing the flow of daily tasks.

Limit Workflow Task Participants





Overview

- Allows admins to define a maximum number of participants that may be selected for each participant control defined in the workflow's start step

Business Justification

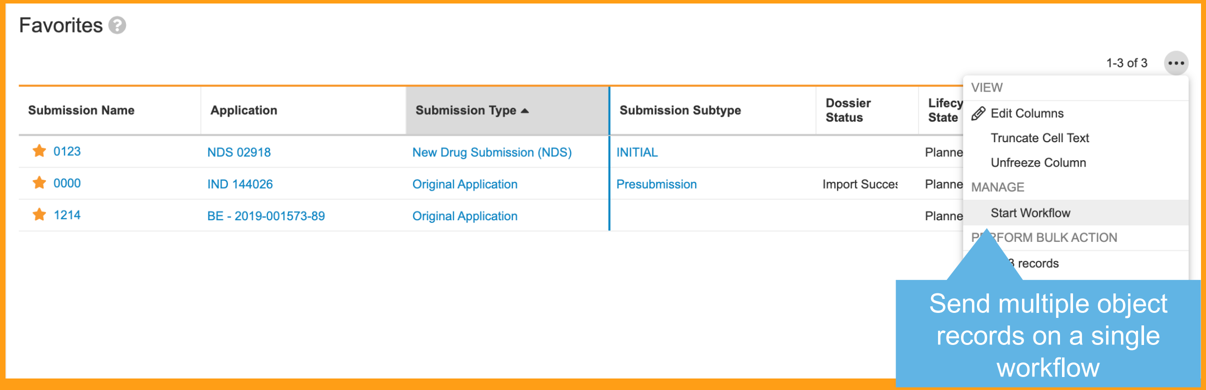
- Provide the ability for more control across workflow start step rules

Limit Workflow Task Participants

- Details
  - This feature only applies when the participant control of a workflow start step is set to *Allow workflow initiator to select participants*
  - The set limit applies to all workflows and each participant control

- Learn more about [Task Participants]

Multi-Record Workflows



Overview

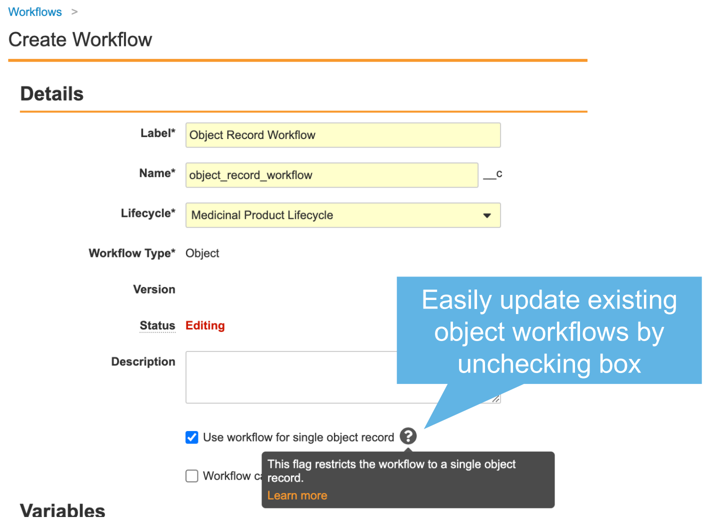
- Users can now send multiple object records on a single workflow

Business Justification

- Increases productivity and improves user experience for task participants

Multi-Record Workflows

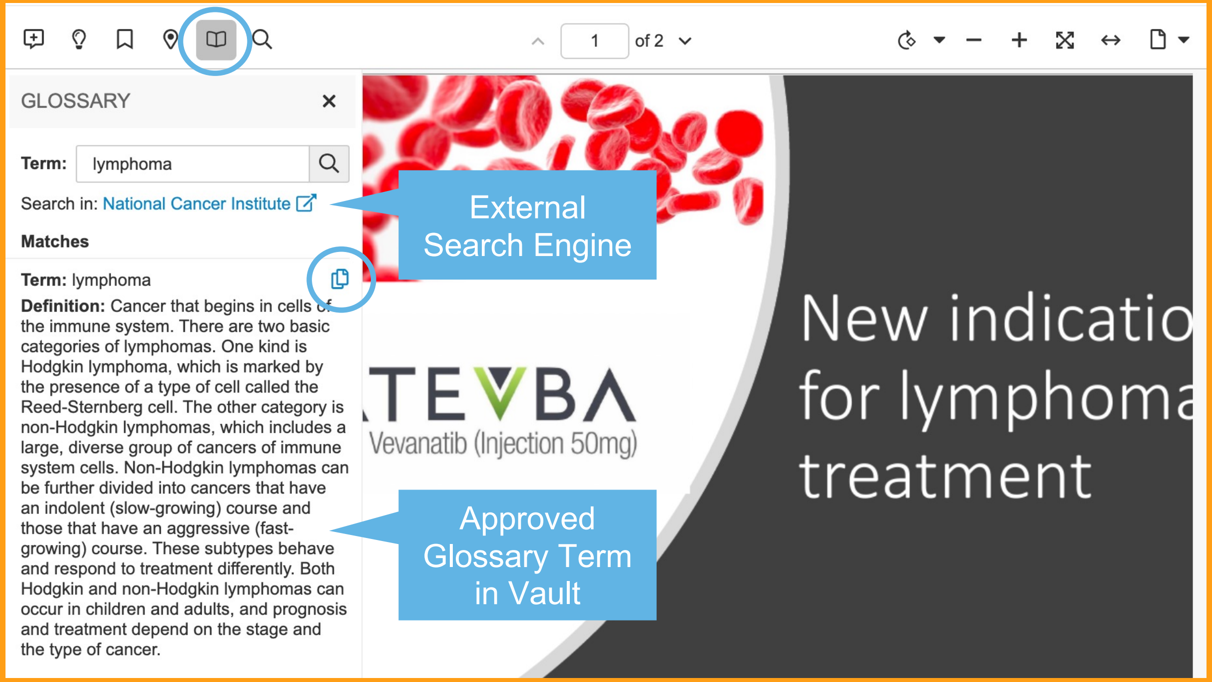
- Details
  - The object records included must all be from the same object
  - Workflows can be initiated from:
    - Object Tabs
    - Related Lists
    - Favorites
    - Saved Views
  - The workflow can only contain the records from the current view/page
  - Will support up to 100 object records at once
  - Existing object workflows will be automatically set to only support single object records, but can be updated to support multiple records



- Learn more about [Object Workflows]()

Searching & Filtering

Glossary Terms



Overview

- Allows users to select text in a document and search for approved Glossary definitions in Vault
- Users can also copy the term and definition to the clipboard for easy sharing

Business Justification

- Will allow users with View Content permission to search definitions for commonly used terms directly in the document view panel

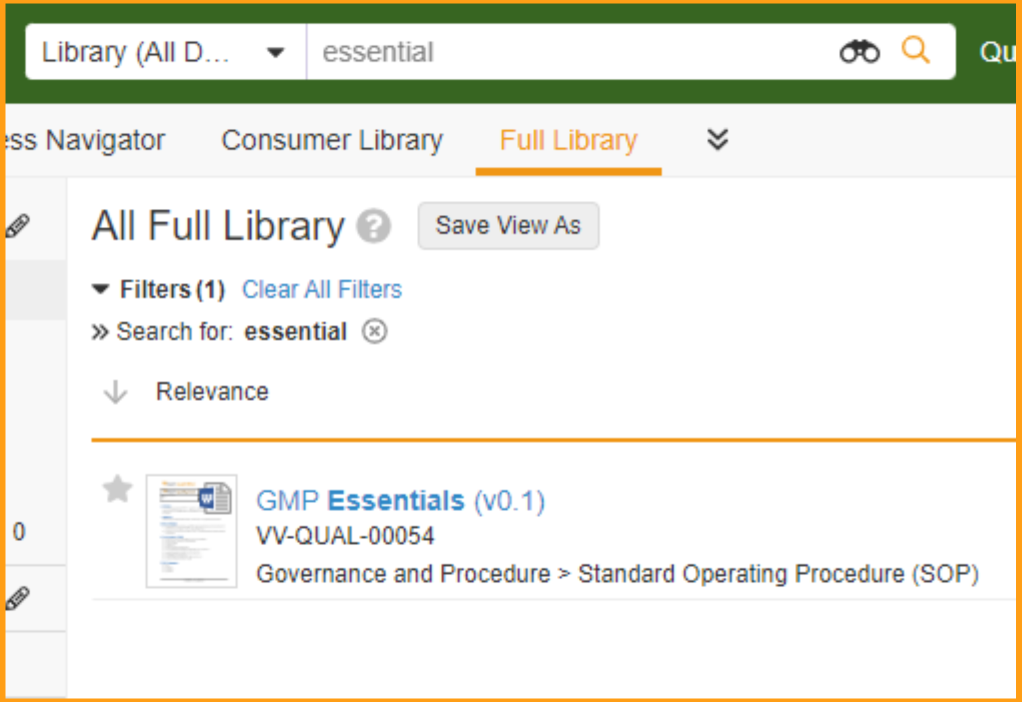
Glossary Terms

- Details
  - Hold down the G key when selecting text in a document to search the Glossary
  - Administrators can build a library of Glossary Definitions and relate Glossary Definitions to each other for the purpose of language matching
  - Admins can view and report on Glossary activity using the Glossary Events object
  - Admins can also configure an external search engine that users can search
    - External Search URL Format Example: https://www.cancer.gov/publications/dictionaries/cancer-terms/def/{{searchTerm}}

- Considerations
  - Disabled by default and controlled by a two-way flag, visible in Admin>General Settings>Documents
  - Glossary terms must be Approved Definitions in Vault to appear in the Glossary Search

- Learn more about The Glossary

Precision Highlighter



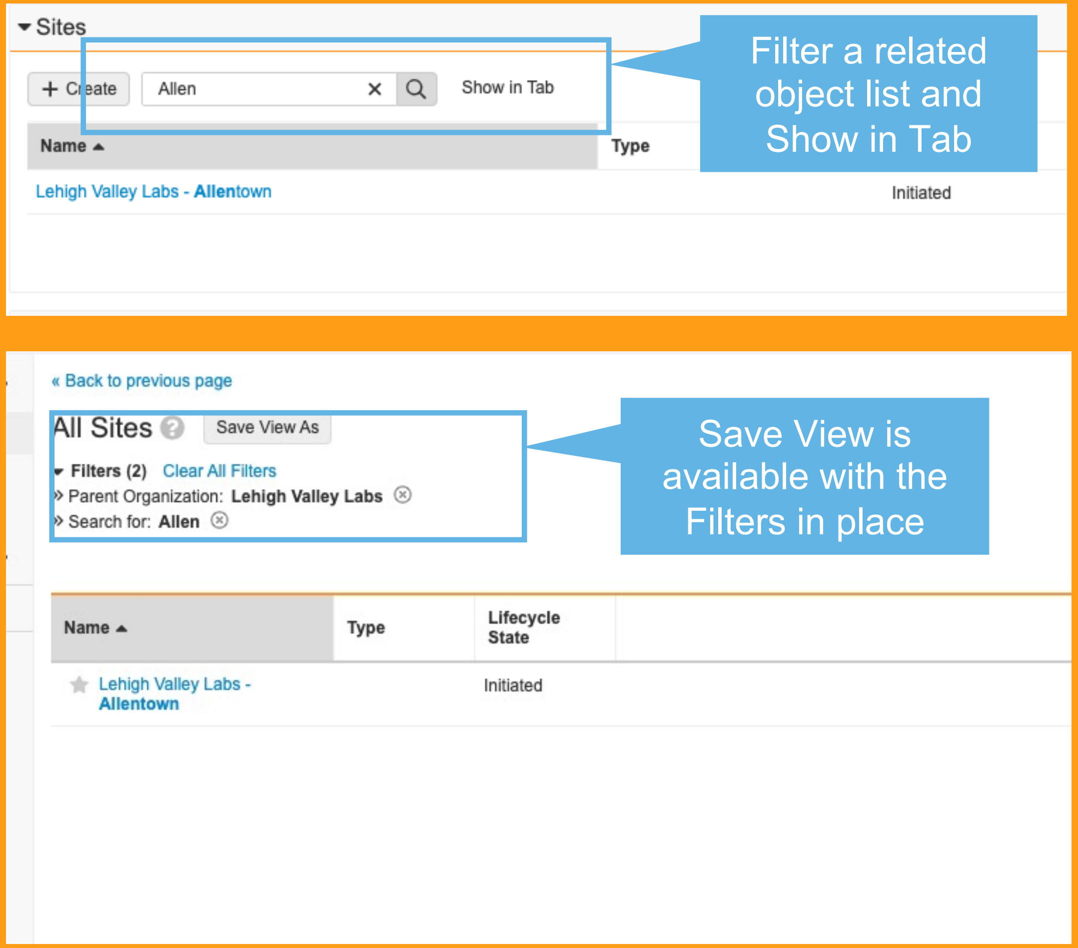
Overview

- The user search experience will now highlight inflected forms and synonyms

Business Justification

- Inclusion of these highlighted terms will give the user immediate visibility to why the result was returned
- Allows users to readily determine similarity in returned search

Saved Views on Dynamic Tabs

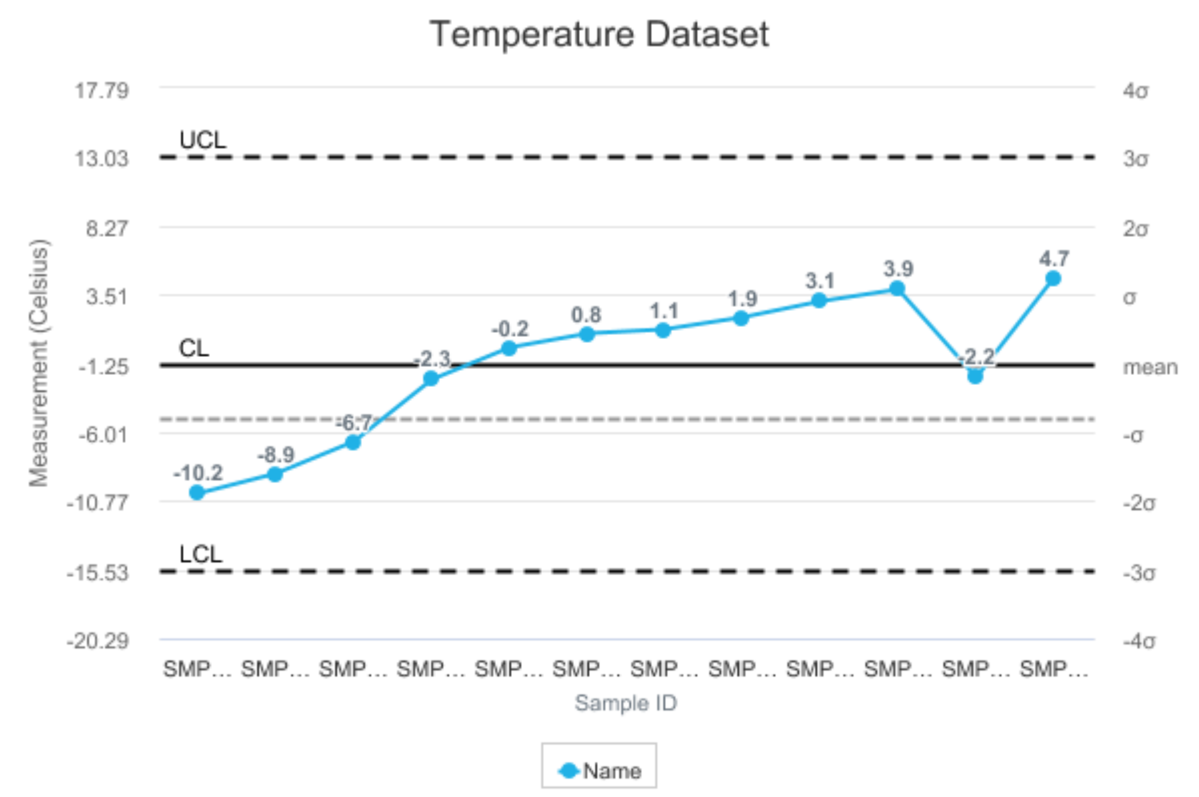


Overview

- This enhancement extends the Save View functionality to a related object list when a user has selected 'Show in Tab'

Reporting

Control Chart



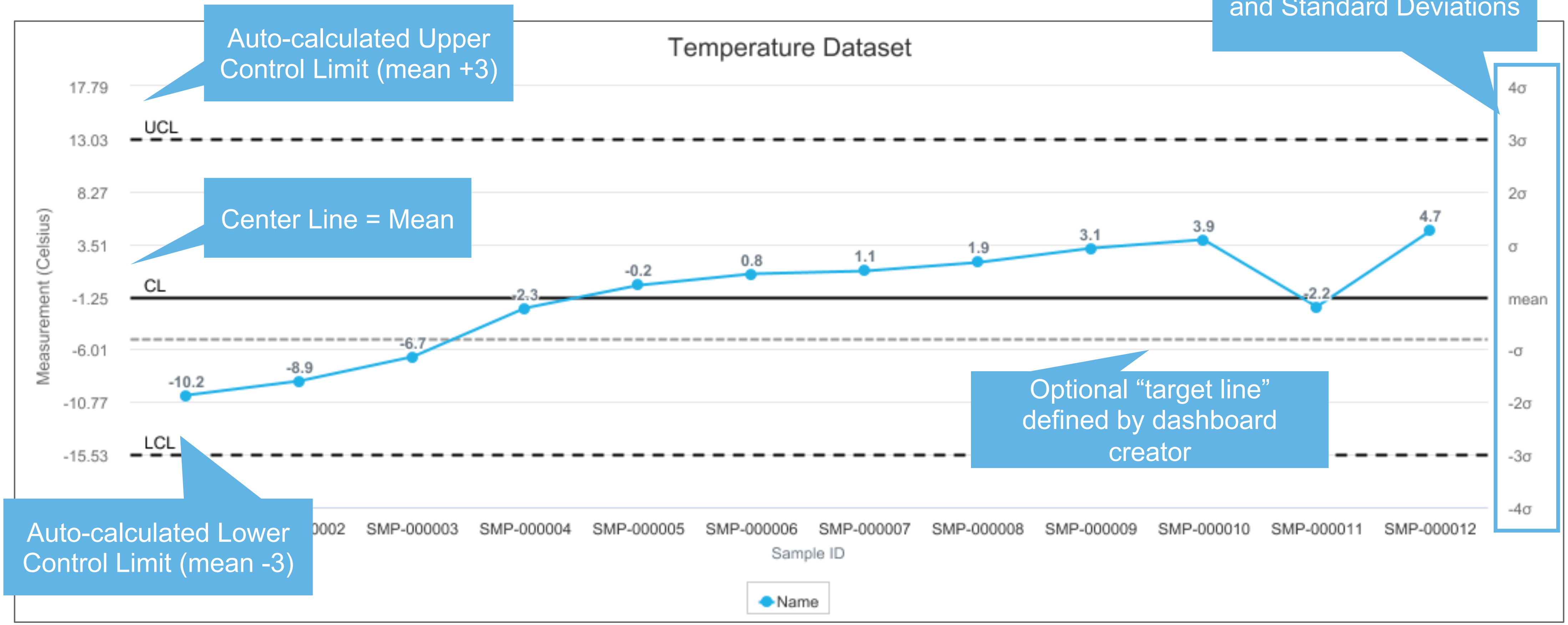
Overview

- Users that create visualizations of data returned by a Vault Report have a new Vault Dashboard element called a Control Chart

Business Justification

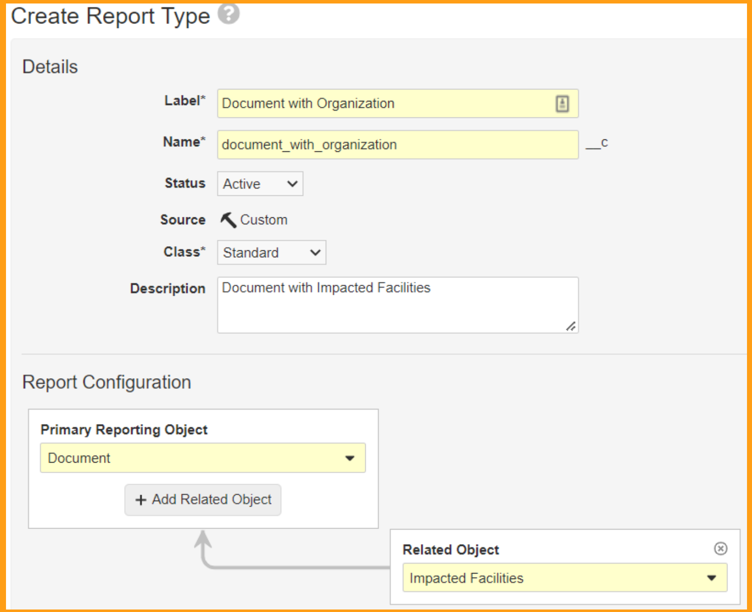
- Control Charts help customers visualize variance within the data returned by a Vault Report

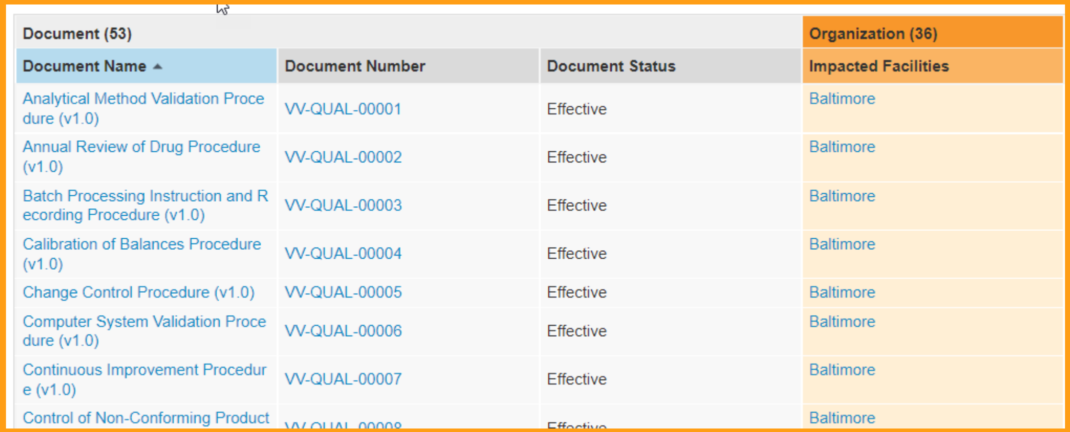
Control Chart



- Considerations
  - A Control Chart requires a Vault Report with at least one field used to group results – a "group by" field is available for use on the x-axis

Document with Object Report Types





Document (53)			Organization (36)
Document Name ▲	Document Number	Document Status	Impacted Facilities
Analytical Method Validation Procedure (v1.0)	VV-QUAL-00001	Effective	Baltimore
Annual Review of Drug Procedure (v1.0)	VV-QUAL-00002	Effective	Baltimore
Batch Processing Instruction and Recording Procedure (v1.0)	VV-QUAL-00003	Effective	Baltimore
Calibration of Balances Procedure (v1.0)	VV-QUAL-00004	Effective	Baltimore
Change Control Procedure (v1.0)	VV-QUAL-00005	Effective	Baltimore
Computer System Validation Procedure (v1.0)	VV-QUAL-00006	Effective	Baltimore
Continuous Improvement Procedure (v1.0)	VV-QUAL-00007	Effective	Baltimore
Control of Non-Conforming Product	VV-QUAL-00008	Effective	Baltimore

Overview

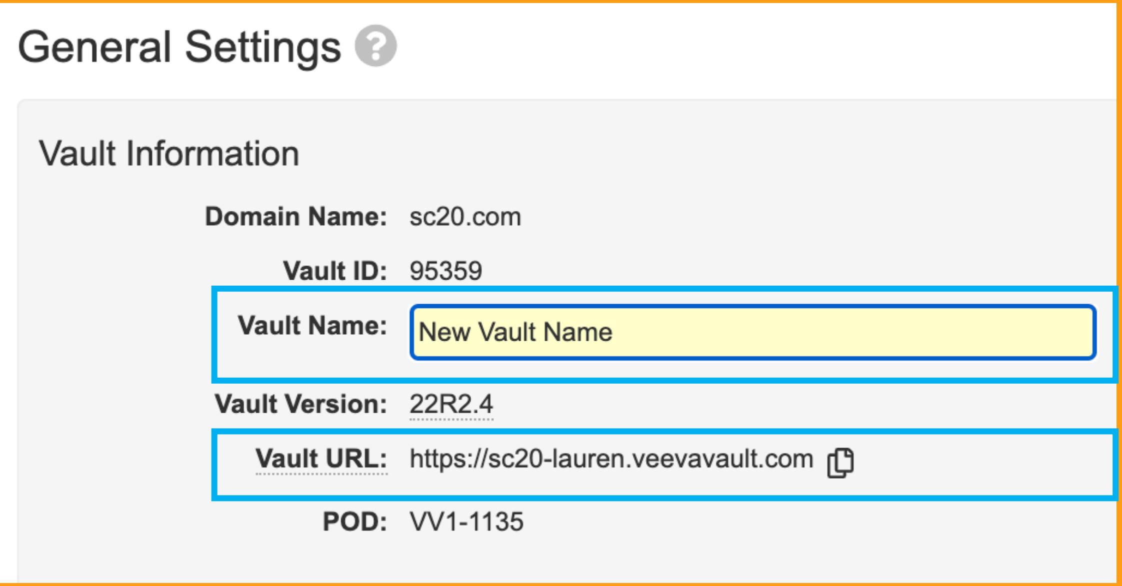
- This feature allows System Admins to create report types that show documents first, followed by documents' associated object records

Business Justification

- Enables customers to prioritize documents in reports that combine documents and their related records

Usability & Interface

Editable Vault Name



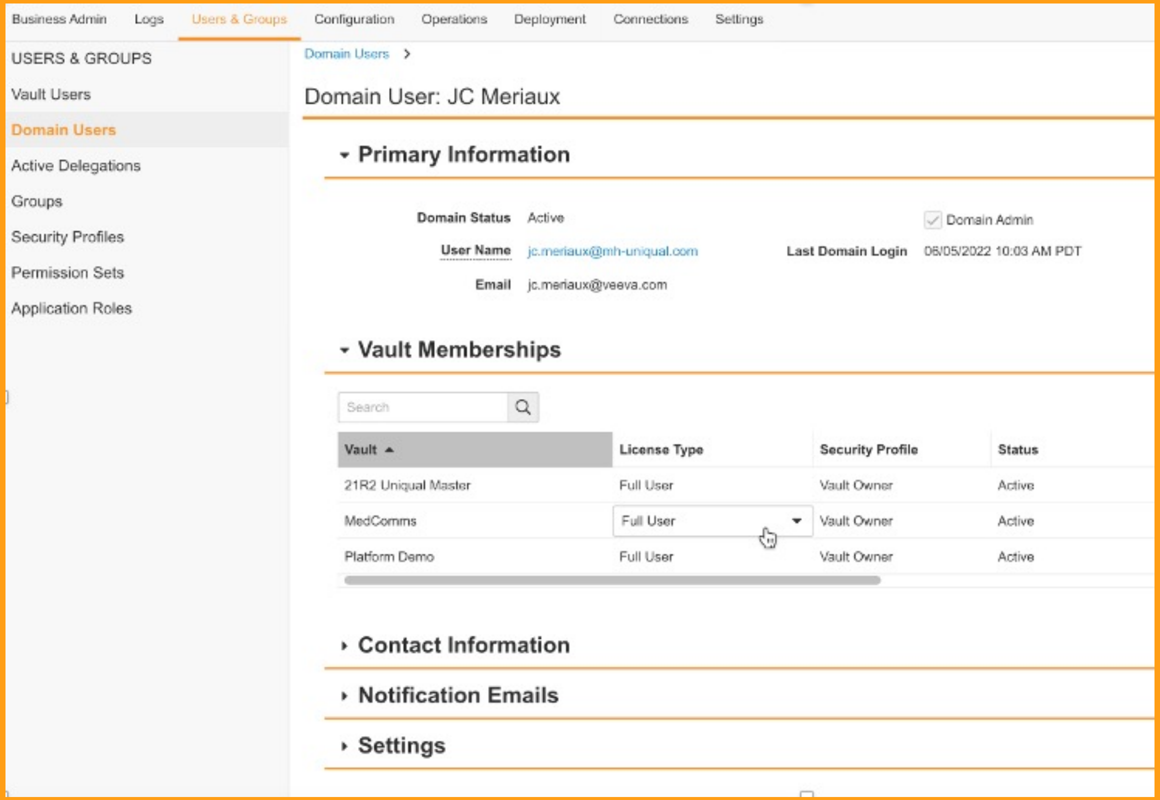
Overview

- System Administrators can now edit the name of a Vault in **Admin > Settings > General Settings**
- This section now displays a Vault's URL

Business Justification

- Making the Vault Name editable removes the need for a customer support ticket
- Changing a Vault's URL still requires customer support

Domain Users: UI Enhancements



Overview

- The domain user UI has been optimized to support domains with a large number of Vaults
- The Vault Membership UI has been enhanced to be more time efficient and intuitive

Business Justification

- When a user is a member of multiple vaults the editing of the profile can be slow due to the page loading, this speeds up the process and makes the administration of vault membership more efficient

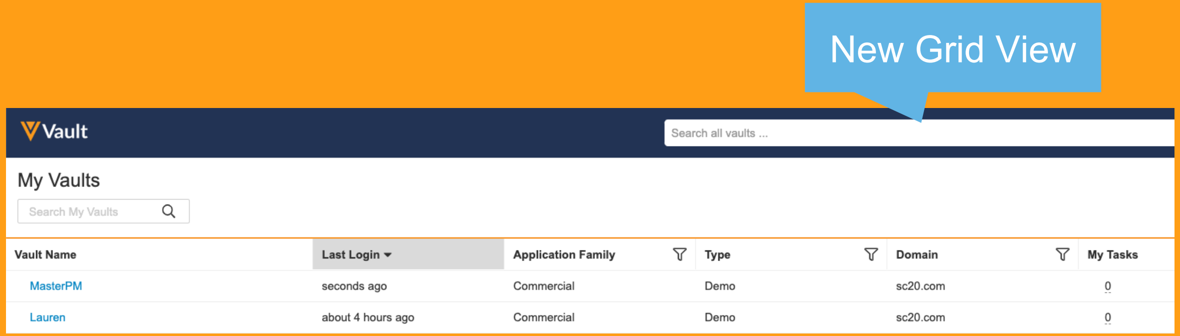
Domain Users: UI Enhancements

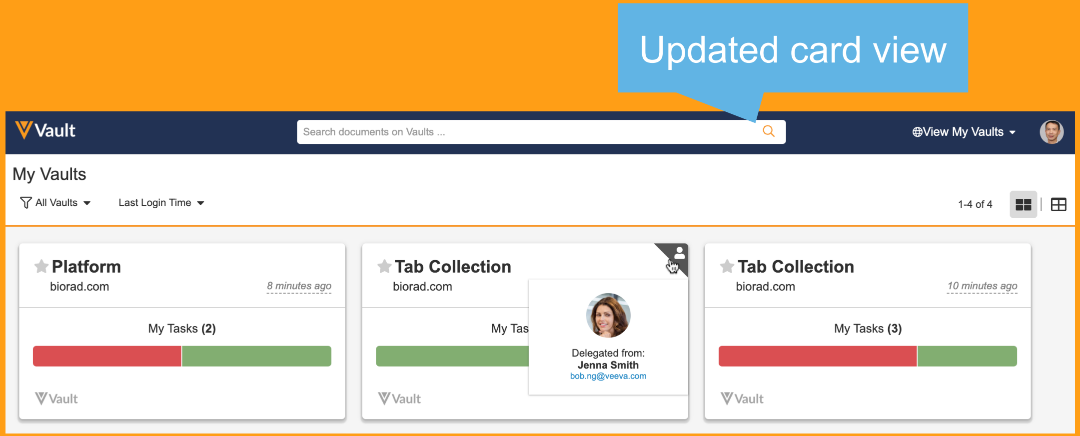
- Details
  - 25 vault memberships displayed per pagination
  - Additional configured attributes can be displayed in the vault membership pane
  - All membership can be exported for a specific user using the ‘Export Memberships’ button to a csv file
  - Online editing is enabled for Security Profile, Licence Type and Status fields
  - Users are now added to a Vault via an ‘Add’ button

- Considerations
  - Restrictions can happen that make the field read-only:
    - The user has access to a Vault but cannot edit memberships
    - A PMO membership cannot be re-activated, so all fields are read-only

- Learn more about Domain User Management

Enterprise Home Page: New Grid View with Updated Card View





Overview

- This release introduces a new Grid View that provides ability to search, filter and sort Vaults
- Users can toggle between Grid View and Card View
- Vault selector picklist, Card View, and Grid View indicate if a Vault is unavailable because it is undergoing maintenance (i.e. new release) or a System Admin placed it in configuration mode

Business Justification

- As customers deploy more and more Vaults, users need to work in a multi-Vault environment

Enterprise Home Page:
New Grid View with Updated Card View

- Details
  - This feature scales the user experience for individuals working in many Vaults (1,000+)

- Considerations
  - The Enterprise Home Page is visible to users if
    - There are multiple Vaults in your organization’s domain
    - A System Admin checked the **Enable My Vaults Page** checkbox in **Admin > Settings > Domain Information**

- Learn more about Using Grid View

Admin & Configuration

Query Governor

```
{
    "responseStatus": "FAILURE",
    "errors": [
        {
            "type": "OPERATION_NOT_ALLOWED",
            "message": "Leading wildcard is not allowed."
        }
    ]
}
```

SELECT id FROM documents FIND('*test')

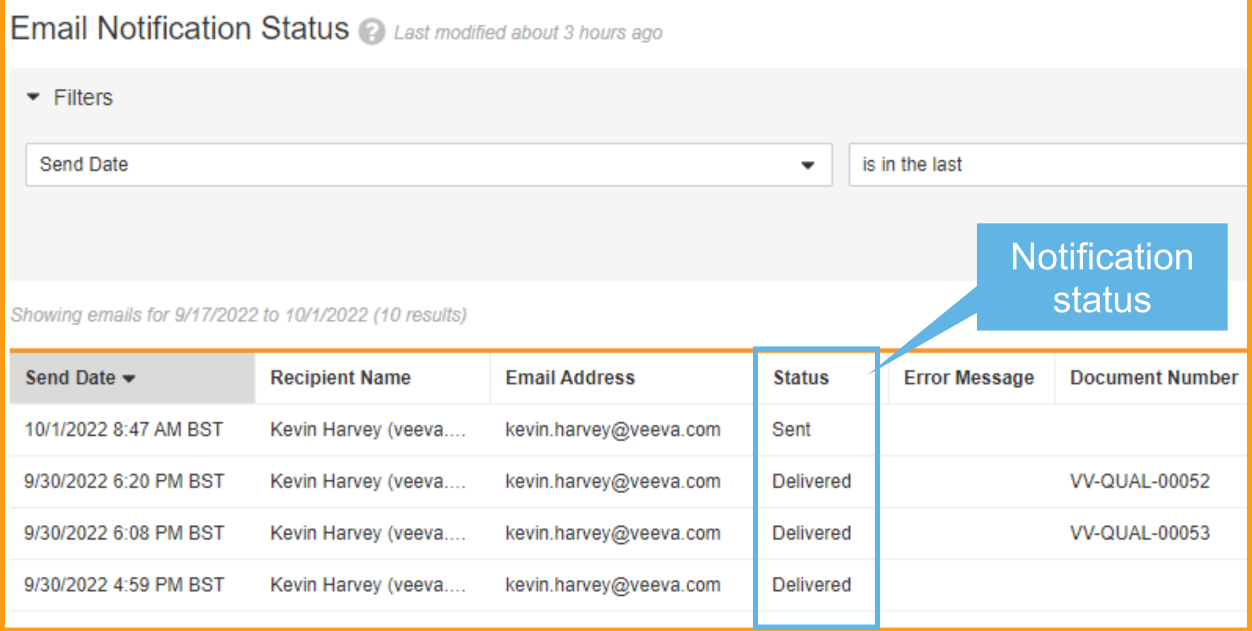
Overview

- System monitoring for VQL queries consisting of a set of rules that return errors and warnings via the API in case a VQL query is identified as being harmful to overall system performance
- With this release the first rule is launched in which the FIND clause no longer supports leading wildcards. This change affects API v22.3+, and existing integrations are not affected

Business Justification

- Alert system for expensive queries to ensure long term Vault stability & performance
- Learn more about Vault Queries

Notifications: Email Notification Status



Email Notification Status *Last modified about 3 hours ago*

Filters

Send Date | is in the last

Showing emails for 9/17/2022 to 10/1/2022 (10 results)

Send Date	Recipient Name	Email Address	Status	Error Message	Document Number
10/1/2022 8:47 AM BST	Kevin Harvey (veeva....	kevin.harvey@veeva.com	Sent		
9/30/2022 6:20 PM BST	Kevin Harvey (veeva....	kevin.harvey@veeva.com	Delivered		VV-QUAL-00052
9/30/2022 6:08 PM BST	Kevin Harvey (veeva....	kevin.harvey@veeva.com	Delivered		VV-QUAL-00053
9/30/2022 4:59 PM BST	Kevin Harvey (veeva....	kevin.harvey@veeva.com	Delivered		

Overview

- In the operations tab, administrators can view email notifications and determine whether they were successfully delivered

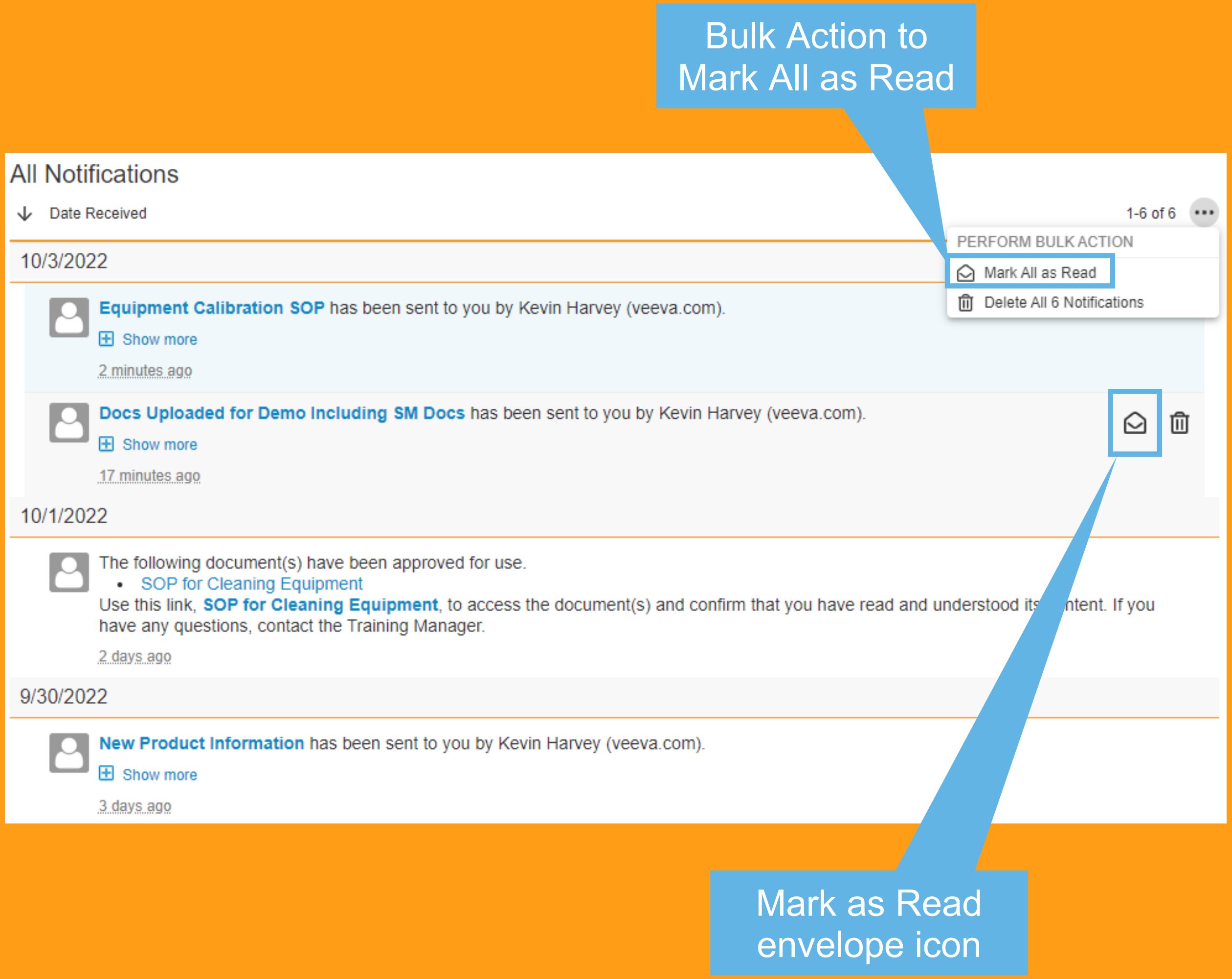
Business Justification

- Administrators say they would like to provide proof that certain notifications were delivered
- Previously customers would need to submit a ticket to Veeva Product Support to obtain this information

Notifications: Email Notification Status

- Notification Status Type
  - **Sent** - The email was sent from Vault, but not delivered yet
  - **Delivered** - The email was successfully delivered to the recipient. It normally takes a day for sent emails to change to delivered
  - **Failed** - The email was not delivered. This is usually due to an invalid email recipient or email domain. More details can be found in the Error Message column
  - **Skipped** - Vault skipped sending the email because the intended recipient's Email Preferences are configured not to send email notifications of this type
  - **Pending** - The notification is included in a summary email that is not sent yet. The summary email will be sent depending on the interval that was set in Email Settings
  - **Summary** - The notification is included in a summary email already sent from Vault. The summary email that includes these notifications will reflect the delivery status
  - **Sent - Unknown** - The email has been sent, but due to a system issue, the delivery status is unknown. A notification's status enters this state if the delivery status cannot be obtained after 10 days. The email may still be delivered

Notifications: Read & Unread status



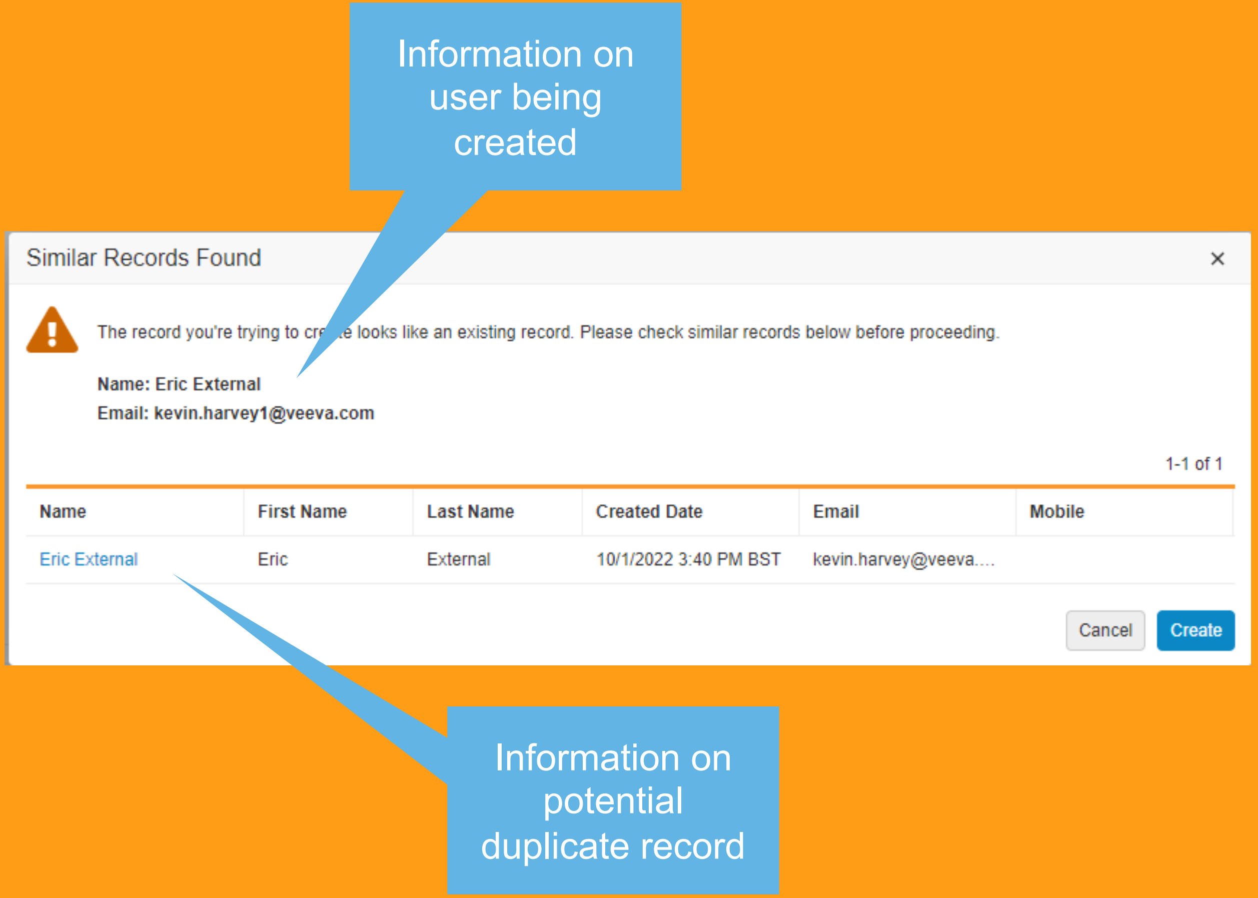
Overview

- A Read and Unread status has been added for each notification. Users can mark unread notifications as Read from the Notifications page

Business Justification

- This web feature supports the introduction of a Notifications tab in Vault Mobile
- Notifications will have a Read and Unread status, which will assist users in focusing on notifications they have not yet reviewed

Person Object: Duplicate Person Record Detection



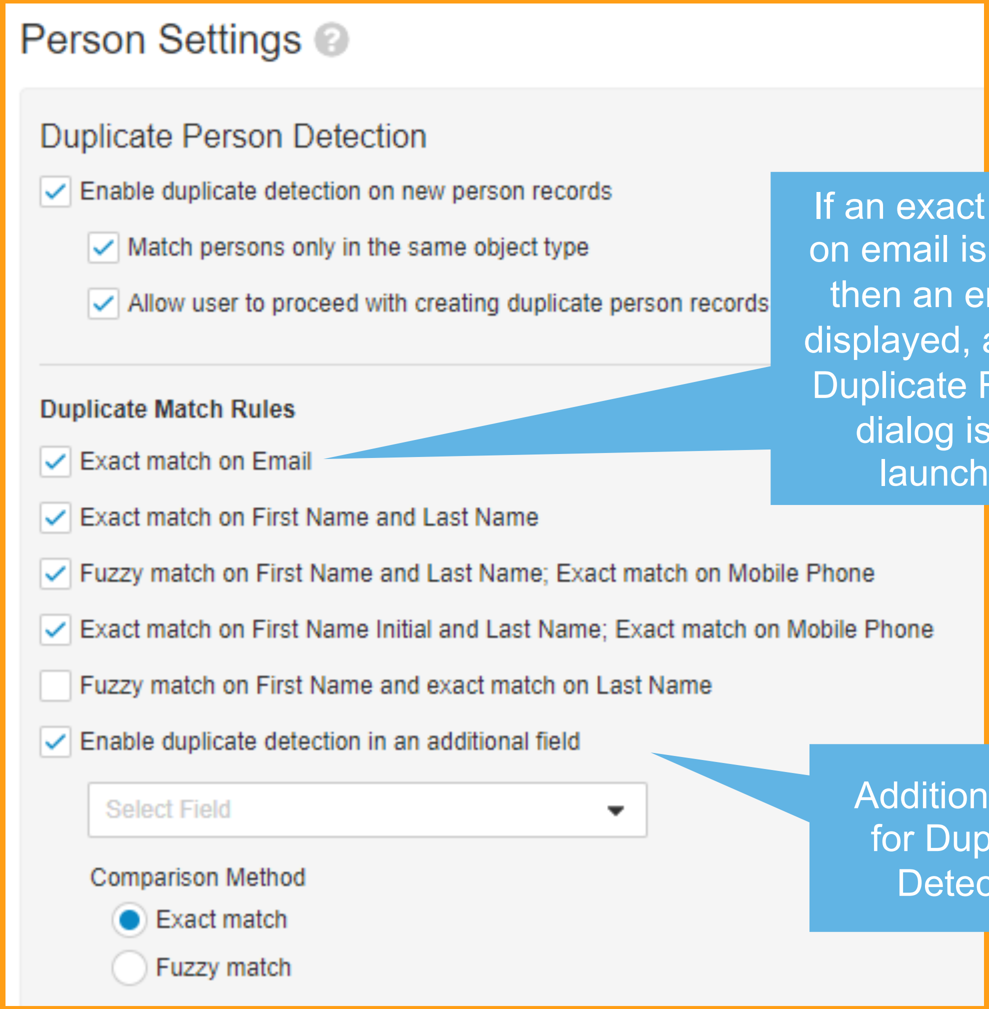
Overview

- This feature helps detect the creation of duplicate person records by alerting users of potential duplicates

Business Justification

- Clean and accurate Global Directory data is becoming increasingly important as customers look to adopt features that depend on data reuse like EDL Automation and Person/ Product/ Org Streamlined Reuse
- Duplication prevention on Person record creation will help customers to improve data quality and reduce time-consuming clean-up efforts

Person Object: Duplicate Person Record Detection



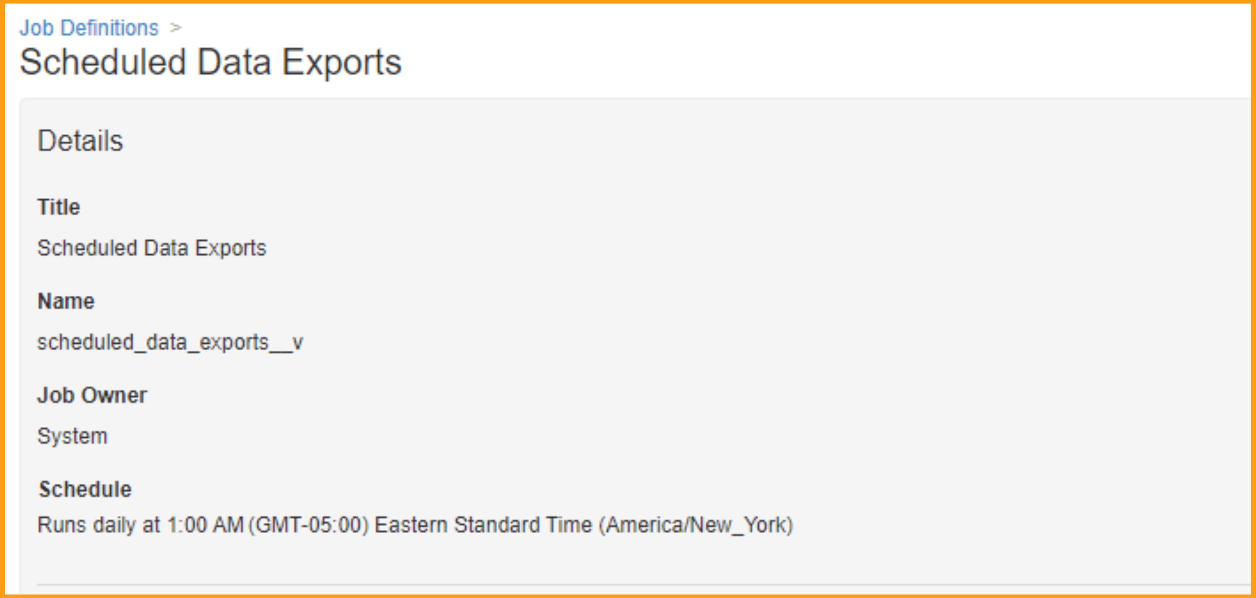
If an exact match on email is found, then an error is displayed, and the Duplicate Record dialog is not launched

Additional field for Duplicate Detection

Considerations

- Duplicate Person Detection can be disabled in Settings
- Matching rules can be enabled/disabled as required
- Potential Person object matching can be made on the following fields:
  - Email
  - First Name
  - Last Name
  - Mobile
- One additional field can be configured to be used in Duplicate Detection

Scheduled Data Exports: Update Scheduled Start Time



Overview

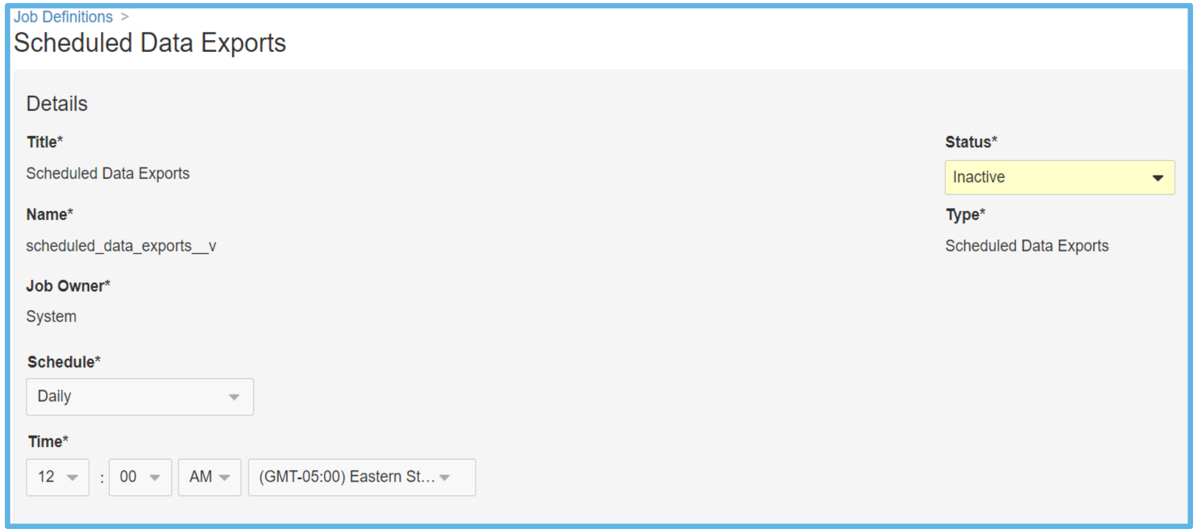
- Admins are able to update the scheduled start time of the scheduled data export job

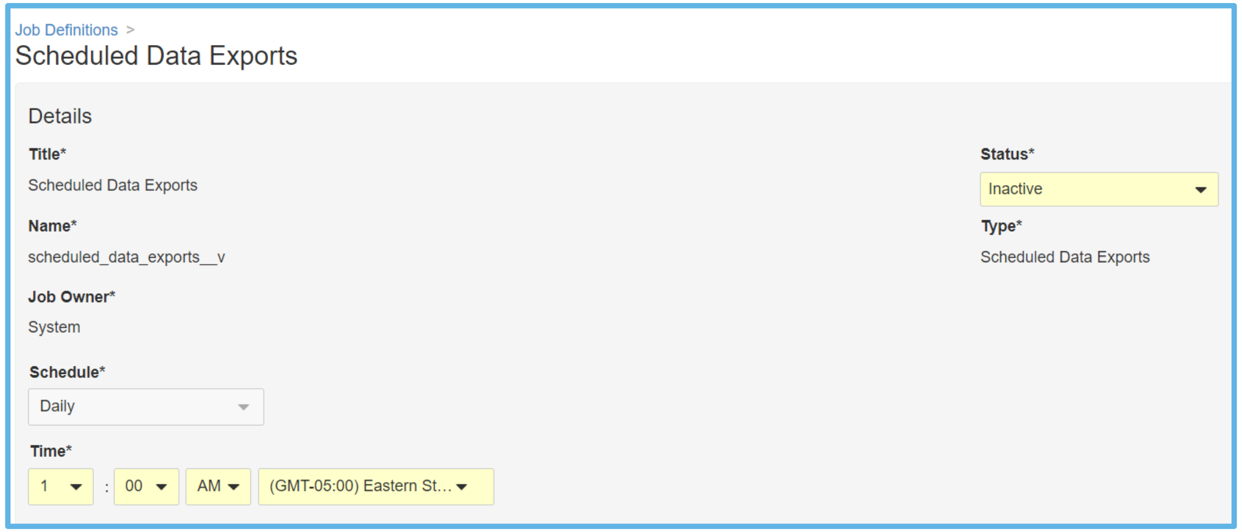
Business Justification

- Feature allows admins the ability to schedule data exports based on business needs

- Learn more about Scheduled Data Exports

Scheduled Data Exports: Update Scheduled Start Time





Scheduled Data Exports: Export Picklist Labels and Names

filing_level__v	filing_level__v.name
Country	country_level__v
Site	site_level__v
Site	site_level__v
Study	study_level__v
Study	study_level__v
Study	study_level__v
Study	study_level__v

Document picklist

picklist9__c	picklist9__c.label
blue__c,green__c,red__c	Blue,Green,Red
blue__c,green__c,red__c	Blue,Green,Red
blue__c,green__c	Blue,Green

Object picklist

Overview

- Scheduled Data Exports of a document, document version, and object metadata now include picklist names and labels

Business Justification

- This feature makes integrations easier
- By including both the names and labels for Picklists, we enable customer integrations to have a convenient way of mapping names to labels

Scheduled Data Exports: Document Metadata in Default Alphabetic Order

Overview

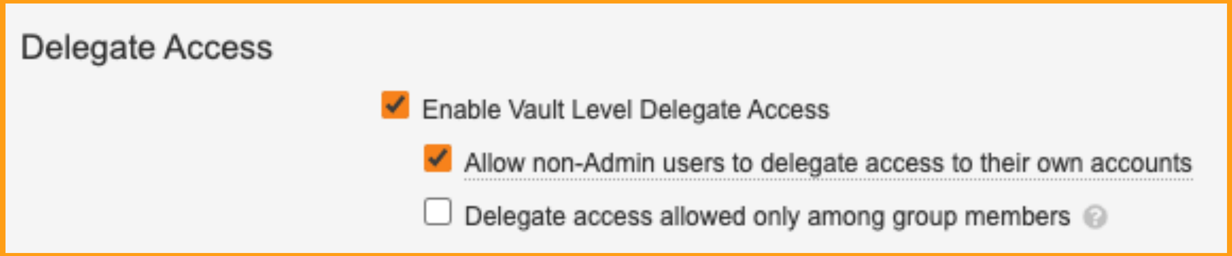
- Scheduled Data Exports of document and document version metadata now have a default alphabetic order for column headers.

Business Justification

- This feature makes integrations easier
- Customer integrations can reliably expect metadata in alphabetic order

- Learn more about Scheduled Data Exports

Delegate Access Feature: Enablement in All Vaults



Overview

- The Delegate Access feature is now made available in all Vaults
- Administrators can enable this feature in Vault Settings (General Settings)

Business Justification

- This provides a secure and audited process for you to designate another user to handle Vault responsibilities on your behalf on a temporary or ongoing basis

System Managed Users –
Default Email and Security Policy

- Overview
  - System Managed Users will have the following change
    - eMail: no-reply@veeva.com (instead of dev.null@veeva.com)
    - Security Policy: System Managed (instead of “Basic”)

- Business Justification
  - Continuation and finalization of standardization efforts for system managed users from 22R2 which was a pending request coming from Audits

- Considerations
  - *This feature will be released ahead of the 22R3 General Release as part of a 22R2 Maintenance Release*

- Learn more about System Managed Users

Test Data Packages: Override Default Reference Lookup Fields

- Overview
  - When creating *Test Data* packages, Admins can now override the default reference lookup to an object with any one of the unique fields available for the object.

- Business Justification
  - Previously, test data packages did not allow you to select a different object reference lookup field apart from the default (ID or link__sys). This change was made to align with the existing behavior of migration packages and to provide more flexibility for test data packages

- Learn more about [Configuration Migration Packages]

Outbound Packages: Support Migrating Group Data

Overview

- Groups (and inter dependent components – see below) can now be included in Configuration Migration Packages and Test Data Packages so that deployment tasks can be reduced
    - Interdependent components include: security profiles, document fields, object lifecycles, document lifecycles, object workflows, saved views, dashboards

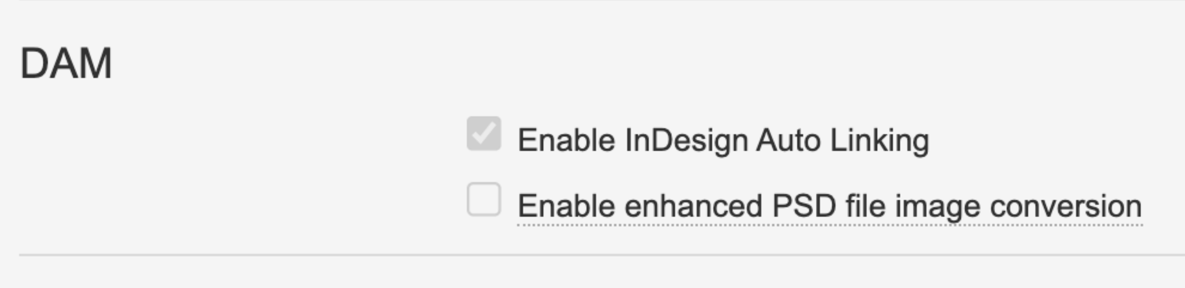
Business Justification

- Migrating groups between Vaults is a frequent requirement in post implementation deployment activities that consist of configuration migration between sandbox and production Vaults. Several components have dependencies on group data and today groups are migrated using Vault Loader as separate deployment tasks increasing the complexity and time of a deployment

- Learn more about Outbound Package Types

Medical

Automated Image Rendition Setting Removal



Overview

- Removed the Application Setting checkbox for "Enable Automated Image Renditions"

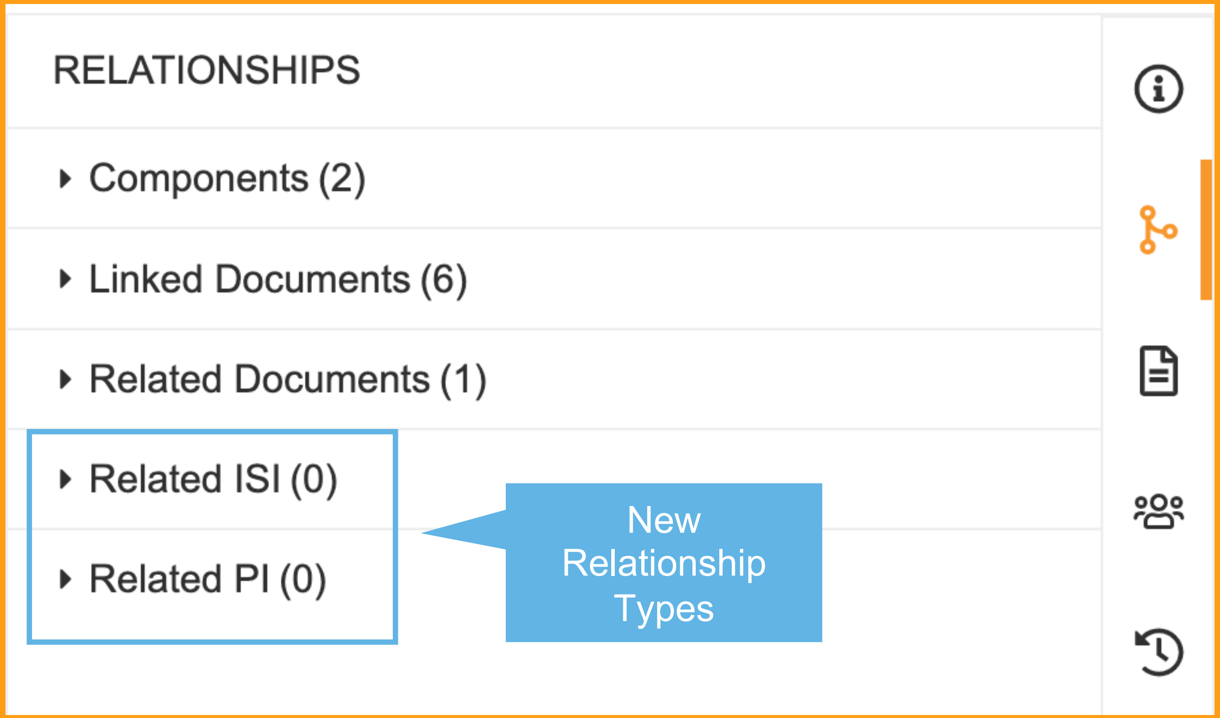
Business Justification

- The Automated Image Renditions feature continues to provide high quality Image Renditions via configuration of Rendition Types without any changes to the existing feature or configuration

Automated Image Rendition Setting Removal

- Details
  - The “Enable enhanced PSD file image conversion” Application Setting is now available for use without the prior enablement of the “Enable Automated Image Renditions” setting
  - The maximum number of Automated Image Rendition Rendition Type that you can create has increased to 25

Related ISI and Related PI Relationships added to Base Document Type



Overview

- New standard Related ISI and Related PI relationship types are added to the Base document type and makes them available for use on all document types

Business Justification

- Helps support the Engage Links for Vault Documents CRM feature where users will be able to share URLs for Vault Documents via social apps

Related ISI and Related PI Relationships added to Base Document Type

- Details
  - When a document is shared, CRM will request a token from Vault and pass CRM as the Distribution Channel Type
  - When the recipient accesses the URL, they will be passed to their browser and the Vault document will appear in the Vault Viewer where the Related ISI and PI documents will be available in the side panel
  - Relationship Types can be deactivated in Admin>Settings>Application Settings>PromoMats Settings

- Considerations
  - The “Related ISI” and “Related PI” Relationship Types will be visible in the Relationship side panel for **all** document types
  - The existing Approved Email ISI and PI relationships are being leveraged so deactivating these relationship types will deactivate them from Approved Email document types as well

Data Agnostic Vault Medical to CRM Connection for Medical Inquiry

Overview

- This feature introduces a new connection to Veeva CRM to pull Medical Inquiries. This only pulls information entered onto the Medical Inquiry in CRM, and does not require Accounts to be synced
  - When the Inquiry is pulled into Med Inquiry, Vault either assigns it to an existing Case Contact if present or creates a new Case Contact

Business Justification

- Supports clients who cannot get a TPA for all of their data and allows for Med Inquiry data to be synced to MedComms on a 1-2-1 basis

Data Agnostic Vault Medical to CRM Connection for Medical Inquiry

- Details
  - The existing integration between Veeva CRM and Vault Medical requires that Account data is synced
    - For customers who have purchased HCP Account data from third parties, they must seek a third-party agreement to to pull Accounts from CRM and store the data in Vault Medical
  - This feature will change the integration so that customers can ensure that no Account records will be shared between the two systems. Only the record of the actual Inquiry will be synced.
  - A job will be added to Vault Medical to push the status back to CRM when the case is closed
    - The push job will only update inquiries that originated in CRM in the Org from where they were pulled
      - No new Inquiries will be created in CRM for cases that originated in Vault Medical, and inquiries will not be pushed to any other Orgs

- Considerations
  - When a case is pulled from CRM to Vault Medical, the contact details will be pulled as part of the Inquiry, but no third-party information will be pulled from the Account Record
  - Since no Account data will be synced, there will be a lack of the corresponding contacts in the Med Inquiry database. To cater to this scenario, a standard integration to OpenData will be built, and the user can search OpenData for the HCP, from which a Case Contact record can be created.

Asynchronous Auto Publish to CRM for Approved Email Fragments

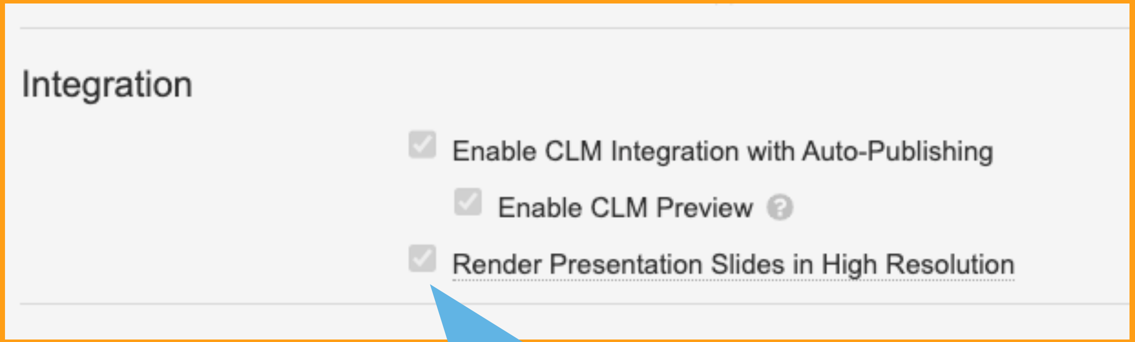
Overview

- Vault automatically creates email fragments asynchronously, enhancing the Auto Publish to CRM for Approved Email Fragments feature
- Vault notifies users when fragments are created and available for use within Vault

Business Justification

- Users are now free to complete other tasks since email fragment creation process now runs in the background and notifies the user upon completion

High Resolution Presentation Slides for CRM & Engage



Optional application setting to enable high resolution generation

Overview

- This feature allows high resolution generation of CLM Presentation Slides for use with CRM and Engage
- This setting will allow Vault to render newly created CLM presentation slides at 96 DPI - an increase from 72 DPI

Business Justification

- This feature will improve image resolution in CRM & Engage, and resolve issues that could occur in some instances where CRM slideshows appeared pixilated when rendered in low resolution

High Resolution Presentation Slides for CRM & Engage

- Details (Optional)
  - By default, MS PowerPoint exports images at 96 DPI, however when converting images for CLM Presentations with CRM they are created at 72 DPI. By increasing the resolution to 96 DPI images will appear correctly in high resolution
  - Admins can enable the feature from within Settings > Application Settings > Integration by checking the new "Render Presentation Slides in High Resolution" Setting

- Considerations
  - This feature will be disabled by default on all Vaults
    - If the setting is disabled, PNG slides will render at 72 DPI which is the existing behaviour

- Learn more about [Working with CLM Content]()

Resources

Resources

- Contact your Customer Success Manger or Managed Services Consultant
- Email: VaultCustomerSuccess@veeva.com
- 22R3 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/

Resources

- Contact your Customer Success Manger or Managed Services Consultant
- Email: VaultCustomerSuccess@veeva.com
- 22R3 Release Kit: https://www.veeva.com/products/medical-suite-release/
- 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

Medical Data Model Changes

- MedInquiry Vaults
  - Added the *Source CRM Org* (source_crm_org__v) field to the *Case* (case__v) object

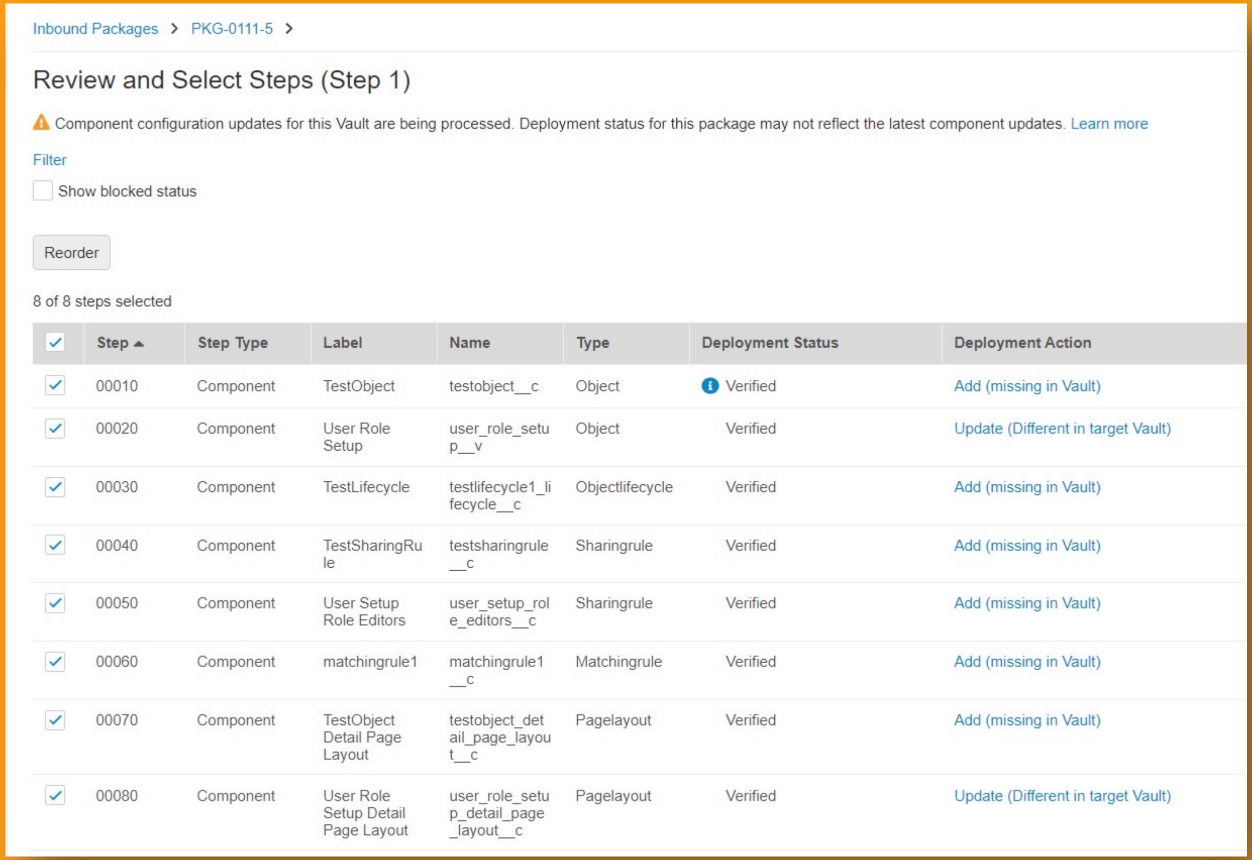
- MedComms Vaults
  - The *Country* (country__v) document field is now a shared document field
  - The *Product* (product__v) document field is now a shared document field
  - Added the *Related ISI* (related_isi__v) relationship type to the *Base* document type
  - Added the *Related PI* (related_pi__v) relationship type to the *Base* document type

Platform Data Model Changes

- Added the *Ad Hoc Sections Allowed* (ad_hoc_sections_allowed__sys) system field.
- Added the *Outbound Email Status* (outbound_email_status__sys) field to the *Person* (person__sys) object to support the **Outbound Email Address for Persons** feature
- Added the following objects to support the **Glossary Terms** feature:
  - *Definition* (glossary_definition__sys)
  - *Glossary Event* (glossary_event__sys)

- Learn more About the 22R3 Release

Configuration Management: Review & Deploy Page Notification for Pending Component Updates



Inbound Packages > PKG-0111-5 >

Review and Select Steps (Step 1)

Component configuration updates for this Vault are being processed. Deployment status for this package may not reflect the latest component updates. Learn more

Filter

Show blocked status

Reorder

8 of 8 steps selected

	Step	Step Type	Label	Name	Type	Deployment Status	Deployment Action
✓	00010	Component	TestObject	testobject__c	Object	Verified	Add (missing in Vault)
✓	00020	Component	User Role Setup	user_role_setup__v	Object	Verified	Update (Different in target Vault)
✓	00030	Component	TestLifecycle	testlifecycle1_lifecycle__c	Objectlifecycle	Verified	Add (missing in Vault)
✓	00040	Component	TestSharingRule	testsharingrule__c	Sharingrule	Verified	Add (missing in Vault)
✓	00050	Component	User Setup Role Editors	user_setup_role_editors__c	Sharingrule	Verified	Add (missing in Vault)
✓	00060	Component	matchingrule1	matchingrule1__c	Matchingrule	Verified	Add (missing in Vault)
✓	00070	Component	TestObject Detail Page Layout	testobject_detail_page_layout__c	Pagelayout	Verified	Add (missing in Vault)
✓	00080	Component	User Role Setup Detail Page Layout	user_role_setup_detail_page_layout__c	Pagelayout	Verified	Update (Different in target Vault)

Overview

- This feature adds a new warning message alerting users of pending configuration changes during the Review & Deploy process

Business Justification

- When Vault displays this message, it means that configuration changes are happening asynchronously, and users should allow the changes to complete prior to continuing the deployment

User Mention Notifications Only Sent for New User Mentions

Overview

- As part of the Notifications on Replies to Notes feature in 22R1, we made a change to the conditions under which User Mention notifications are sent
- Vault no longer sends User Mention notifications when a user edits an existing Note or Reply with an existing User Mention. Vault only sends User Mention notifications when a User Mention is added to a new or existing Note

Admin Tabs & Business Admin Tabs Updates

- With the introduction of the Tab Collections feature in the upcoming 23R1 release, the Business Admin tab will be separated from the other Admin tabs as its own tab collection
- Users who have permission to view Admin and Business Admin tabs will now access them from a new Tab Collection icon
- Vault will no longer display the existing cog icon for viewing Admin tabs
- These enhancements will provide a better user experience for managing data in Business Admin and offer a more consistent feel in viewing different tab collections

- Learn more about Admin Tabs & Business Admin Tabs

Improved Error Handling for Signature Page Generation

Overview

- With this release, Vault will validate the template layout of Advanced Templates upon downloading a signature page to ensure all signatures can be manifested. Templates configured with a maximum row count on the signature blocks that exceeds the number of expected signatures will trigger an error prompting an Admin to address the issue