

# Veeva Vault Vault 22R3 Release Impact Assessment

The Release Impact Assessment (RIA) documents the new capabilities introduced in Vault in 22R3 that may affect a customer's Vault. We release a version of the RIA in advance of the general release. The Validation Impact Assessment, which contains validation information for new features that have validation impact in 22R3, will be available in the Veeva Compliance Docs (VeevaDocs) Vault on October 31st. Refer to the Enablement and Default Impact for each feature to determine the visibility and configuration requirements. On Oct 24th, the [22R3 Release Notes](#) will be available, containing additional details about each feature and data model changes in your Vault. This RIA applies to the following Vault application families: Platform, Clinical Operations, Commercial, Medical, Mobile, Quality, Training, and Regulatory

**Revision Date:** 02 Dec 2022

*This feature list is subject to change prior to the 22R3 release. All changes after initial publication are listed in the Change Log. Updates will stop on Dec. 3rd, 2022.*

<b>Feature:</b>	Name of the feature introduced in 22R3
<b>GxP Risk:</b>	GxP risk analysis takes into account data integrity, security, and confidentiality assuming the feature is turned on (either automatically or via configuration). Veeva performs validation testing on all High and Medium GxP risk items.
<i>High</i>	May affect security, patient confidentiality, application areas that support GxP functions (audit trails, eSignature, etc.) or other ERES controls data
<i>Medium</i>	May affect core application functions (workflows, revision history, etc.)
<i>Low</i>	May affect metadata/notifications
<i>N/A</i>	The feature is a minor UI enhancement and not a functional change. The feature has no validation impact.
<b>Enablement Setting:</b>	Indicates whether the feature is available automatically, requires configuration by an Admin (an Admin area checkbox or a more complex setup), or must be enabled by contacting Veeva Support. Note that in some cases, an Auto-on feature is dependent on another feature that must be enabled or configured. In other cases, individual users (not Admins) need to perform some setup, for example, with new Reporting capabilities that require creation of a new report.
<b>Default Impact:</b>	Impact to business users and processes at Day 1 if no configuration occurs
<i>Visible to All Users</i>	Automatically on and visible to both Admins and end users
<i>Visible to Admins Only</i>	Only visible to Admins, or it requires configuration by an Admin before it is available to end users
<i>None</i>	Not visible in Vault unless enabled by Support

Clinical Operations	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	CTMS	Clinical Operations to Medical CRM Connection: Standard Field Mappings	Medium	Auto-on	Visible to Admins Only	This feature introduces standard Field Rules for the Integration Rules applicable to the Clinical Operations to Medical CRM Connection. *Auto-on in Vaults with Clinical Operations to Medical CRM Connection enabled
	CTMS	Addition of Oversight Tab	N/A	Configuration	Visible to Admins Only	Adds a menu tab to support future oversight activities.
	CTMS	Clinical Operations to Medical CRM Connection: Activity Deletion Support	Medium	Auto-on	Visible to All Users	The Clinical Operations to Medical CRM Connection now indicates when transferred activities or interactions are deleted in the source system. *Auto-on in Vaults with Clinical Operations to Medical CRM Connection enabled
	CTMS	Yuzu: CTN Change Log Enhancements	Medium	Auto-on	Visible to All Users	Improves the change log capabilities for managing the CTN (Clinical Trial Notification) generation for Japan's PMDA, giving customers who have enabled the CTN generation setting in a CTMS Vault an improved ability to track changes to CTN elements for future submissions
	CTMS, Study Startup, Vault Payments, eTMF	Clinical Operations Data Model Changes	N/A	Auto-on	Visible to All Users	With every release, we update the data model to better support evolving needs and new feature functionality. The data model changes included in this feature also cover the Site Connect application.
	Vault Payments	Automate Payment Adjustments	Medium	Admin Checkbox	Visible to Admins Only	Vault Payments now allows customers to automatically generate adjustments when Subject Visit and Procedure data change. Adjustments will also be created if additional Fee Schedules are created.
	Vault Payments	Generate Payable Items available in Fee Schedule Workflows	Medium	Configuration	Visible to Admins Only	The Generate Payable Items action is now available in Fee Schedule Workflows
	Vault Payments	Payment Limits & Date Effectivity	Medium	Auto-on	Visible to All Users	Vault Payments now supports Payment Rules across multiple Fee Schedules. Maximum reimbursements and Rates now include Fees with matching names across all approved Fee Schedules for a site.

	CTMS<>CDMS	ClinOps/CDMS: Study Pause	Medium	Configuration	Visible to All Users	Admins can pause and resume the ClinOps to CDMS Connection for specific studies while other studies continue to sync.
	eConsent	eConsent Sponsor Templates	Medium	Auto-on	Visible to All Users	With this update, Study and Country level eConsent documents must be designated as a Sponsor Template before sending to Sites. This designation is made using the new 'Sponsor Template for Site' field located in the Site Information section of the document.
	eTMF	TMF Bot: Prediction Metrics	Low	Auto-on	Visible to Admins Only	Monthly in-system metric records are created for Predictions, allowing users to measure model performance over time.  This feature is Auto-on only if customer has deployed model
	eTMF	Support for Transferring Inactive Document Types in TMF Transfer	Medium	Auto-on	Visible to All Users	Allows TMF Transfer to transfer document versions associated to inactive document types.
	eTMF	Vault Mobile: TMF Bot Support	Medium	Auto-on	Visible to All Users	Adds Vault Mobile support for TMF Bot.  *This feature is Auto-on only for customers with a deployed Trained Model.
	eTMF	Auto-Classification of Email Attachments	N/A	Auto-on	Visible to All Users	This feature adds support for Documents created from Email Attachments.
	Study Startup, eTMF	Email to Vault: Create Documents from Attachments	Medium	Configuration	Visible to Admins Only	Adds a new email processor to create an unclassified document from each email file attachment sent to a Clinical Vault system email address with the Clinical Document Attachments processor.
	Study Startup, eTMF	Increment # Expected from Matched Documents	Medium	Support	None	This feature introduces triggers on EDL item to update the #Expected and Requiredness field values when an expected document is additionally matched.
	Site Connect	Site Connect Features Now in Digital Trials Platform RIA	N/A	N/A	None	For 22R3 and later releases, Site Connect features are documented in the Digital Trials Platform Release Impact Assessment (Available October 3) on <a href="https://sites.veevavault.help">https://sites.veevavault.help</a> .
	SiteVault eReg,	SiteVault (eRegulatory &	N/A	N/A	None	For 22R3 and later releases, features for

	SiteVault Enterprise, Study Connect, SiteVault Free	Study Connect) Features Now in Digital Trials Platform RIA				SiteVault (eRegulatory & Study Connect) are documented in the Digital Trials Platform Release Impact Assessment (Available October 3) and What's New (Available October 24) on <a href="https://sites.veevavault.help">https://sites.veevavault.help</a> .
Commercial	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	MedComms	Data Agnostic Vault Medical to CRM Connection for Medical Inquiry: Push Status Back to CRM	Medium	Auto-on	Visible to All Users	Cases closed in Vault Medical that originated in Vault CRM will have an update pushed back to the CRM Org in which they originated. This is a status update to say the inquiry has been closed.
	MedComms	Define MedComms & MedInquiry Applications in Vault Medical	Medium	Auto-on	Visible to All Users	The existing MedComms Vault will be renamed to Vault Medical. Within Vault Medical, two independently licensable applications will be available: MedComms and MedInquiry.
	MedComms	Network Connection for Medical Inquiry	Low	Auto-on	Visible to All Users	In Vaults with the OpenData Connection configured, the connection pulls Case Contact and Person Address data into the Vault. *Auto-on in Vaults with the OpenData Connection configured
	MedComms, PromoMats	Commercial Data Model Changes	N/A	Auto-on	Visible to All Users	With every release, we update the data model to better support evolving needs and new feature functionality.
	PromoMats	Add Promotional Documents to eCTD Compliance Packages	High	Configuration	Visible to Admins Only	Users can add promotional materials to an existing eCTD compliance package.
	PromoMats	Add Supporting Documents to eCTD Compliance Packages	High	Configuration	Visible to Admins Only	Users can automatically pull in supporting documents while generating a Pre Clearance or Post Marketing eCTD Compliance Package.
	PromoMats	eCTD Submission Package	High	Configuration	Visible to Admins Only	Users can automatically pull in clean materials while generating a Pre Clearance or Post Marketing eCTD Compliance Package.
	PromoMats	Copy Source of Text Assets	Low	Auto-on	Visible to Admins Only	This feature introduces a new standard field, Source Text Asset, on the annotation_keywords__sys object.
	PromoMats	Multi:Product &	Low	Auto-on	Visible to Admins Only	This feature adds two (2) standard join



		Multi:Country Support for Content Modules				objects, Content Module County and Content Module Product, and introduces two (2) new Admin checkboxes to enable automatic join record creation.
PromoMats		Multi:Product & Multi:Country Support for Text Assets (Claims and Reusable Text)	Low	Auto-on	Visible to Admins Only	This feature adds two (2) standard join objects, Text Asset County and Text Asset Product, and introduces two (2) new Admin checkboxes to enable automatic join record creation.
PromoMats		Enhanced Suggest Links	Low	Admin Checkbox	Visible to Admins Only	This feature improves the Suggest Links matching functionality and introduces the ability to build the Suggest Links action into the lifecycle process. This feature also introduces support for matching Text Assets related to Multiple Countries & Products while using Suggest Links.
PromoMats		High Resolution Presentation Slides for CRM & Engage	Low	Admin Checkbox	Visible to Admins Only	In this release, Vault allows high resolution generation of CLM Presentation Slides for use with CRM and Engage.
PromoMats		Modular Content & Claims Data Model Change	Low	Configuration	Visible to Admins Only	This feature adds new configuration to PromoMats to improve the creation, management, and usage of Text Assets (Claims & Reusable Text records) and Content Modules.
PromoMats		Vault CRM to PromoMats Connection	Low	Configuration	Visible to Admins Only	This feature is the PromoMats side of the Vault CRM-PromoMats connection. This connection copies Approved documents into Vault CRM.
PromoMats		Automated Image Rendition Setting Removal	N/A	Auto-on	Visible to Admins Only	We have removed the Application Setting checkbox for “Enable Automated Image Renditions” and made the “Enable enhanced PSD file image conversion” Application Setting available for use. Users can now create a maximum of 25 Automated Image Rendition types.
PromoMats		Related ISI & Related PI Relationships Added to Base Document Type	N/A	Auto-on	Visible to Admins Only	This feature adds the new standard Related ISI and Related PI relationship types to the Base document type and makes them available for use on all document types.
PromoMats		Asynchronous Auto Publish to CRM for Approved Email Fragments	Low	Auto-on	Visible to All Users	Vault automatically creates email fragments asynchronously, enhancing the

						Auto Publish to CRM for Approved Email Fragments feature.
	PromoMats	Prevent Duplicate Suggested Links	Low	Auto-on	Visible to All Users	When performing Suggest Links, Vault will not create a new Suggested or Auto link if it would duplicate an existing Suggested, Auto or Approved link.
Mobile	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	Vault Mobile	BRD updates for Mobiletab component	Low	Auto-on	Visible to Admins Only	Documentation addition only. Additional requirements added to the Migration BRD to include the Mobiletab component type.
	Vault Mobile	Capture & Create New Documents	Medium	Auto-on	Visible to All Users	Users can use their phone camera to scan documents and upload them to Vault through the Library mobile tab.
	Vault Mobile	BRD updates for Mobileshareactionconfig component	Low	Auto-on	Visible to All Users	Documentation addition only. Additional requirements added to the Migration BRD to include the Mobileshareactionconfig component type.
	Vault Mobile	Display Mobile App Version & Privacy Policy	Low	Auto-on	Visible to All Users	Users can see which version of the mobile app they are on and copy that value to clipboard. A new button has been added to the bottom of the Vault Selector, which displays the mobile app version as well as a link to the privacy policy.
	Vault Mobile	Enforce Mobile App Version: iOS Only	Low	Auto-on	Visible to All Users	The iOS app will now prompt users that are using an outdated app version to upgrade the app.
	Vault Mobile	New Mobile Tab: Notifications	Low	Auto-on	Visible to All Users	Users can now view all their notifications in the mobile app.
	Vault Mobile	View All Task Types	Low	Auto-on	Visible to All Users	Users can see all task types rather than just document tasks in the mobile app. Users can open tasks that can't be completed within the app in a mobile browser.
Platform	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	Platform	Multi-Record Workflows	High	Configuration	Visible to Admins Only	Users can send multiple records on the same workflow, increasing productivity and improving user experience for task participants. Admins may now define workflows that support up to 100 records of the same object as well as enable

						existing workflows to support multiple records.
Platform	Limit Workflow Task Participants	Medium	Admin Checkbox	Visible to Admins Only		Admins can define a maximum number of participants that may be selected for each participant control defined in the workflow's start step.
Platform	Checklists: Ad-hoc Sections	Medium	Configuration	Visible to Admins Only		Admins can configure checklists to allow respondents to add sections to checklist instances on an ad-hoc basis.
Platform	Currency Formula Fields	Medium	Configuration	Visible to Admins Only		This feature introduces the formula field type currency to object formula fields. Currency formula fields return numerical data formatted as a corporate or local currency.
Platform	Outbound Email Address for Persons	Medium	Configuration	Visible to Admins Only		For Vaults with Outbound Email Domain enabled, an outbound email address can be defined on Person records.
Platform	Domain Users: UI Enhancements	Low	Auto-on	Visible to Admins Only		The domain user UI has been optimized to support domains with a large number of Vaults.
Platform	HVO Lookup Field Support in Reports	Low	Auto-on	Visible to Admins Only		Users can now report on HVO lookup fields.
Platform	Notifications: Email Notification Status	Low	Auto-on	Visible to Admins Only		Admins can view and filter the delivery status of email notifications on a new page in the Operations tab as well as export it to CSV.
Platform	Outbound Packages: Support Migrating Group Data	Low	Auto-on	Visible to Admins Only		Groups can now be included in Configuration Migration Packages and Test Data Packages.
Platform	Scheduled Data Exports: Document Metadata in Default Alphabetic Order	Low	Auto-on	Visible to Admins Only		Scheduled Data Exports of document and document version metadata now have a default alphabetic order for column headers.
Platform	Scheduled Data Exports: Export Picklist Labels and Names	Low	Auto-on	Visible to Admins Only		Scheduled Data Exports of document, document version, and object metadata now include picklist names and labels.
Platform	System Managed Users: Standardizing Email & Security Policy	Low	Auto-on	Visible to Admins Only		System Managed users have a standardized security policy (System Managed) and email (no-reply@veeva.com).
Platform	Test Data Packages: Override Default Reference Lookup Fields	Low	Auto-on	Visible to Admins Only		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.
Platform	Glossary Terms	Low	Admin Checkbox	Visible to Admins Only		Users can select text in a document and search for approved Glossary definitions.
Platform	Document with Object Report Types	Low	Configuration	Visible to Admins Only		Users can create reports on documents and their associated object records.
Platform	Editable Vault Name	Low	Configuration	Visible to Admins Only		Admins can edit the Vault Name field on the Vault General Settings page (Admin > Settings > General Settings). Additionally, the General Settings page now displays the Vault URL.
Platform	Lookup Field for High Volume Objects	Low	Configuration	Visible to Admins Only		High volume objects (HVOs) now support lookup fields. This enhancement closes a feature gap that blocked app teams and customers from adopting HVO. All lookup fields now include a new attribute called 'searchable'. Lookup fields that are searchable support filtering and sorting. HVO lookup fields are searchable if the source field is indexed.
Platform	Object Reference Fields in Formulas	Low	Configuration	Visible to Admins Only		Vault formulas can now use object reference fields on objects. Existing uses of object reference fields on objects that return the record ID or the record label as text will continue to return the same value. Use of object reference fields are available in object, workflow, and lifecycle formula use cases.
Platform	Clarify Atomic Security Reporting in Vault Configuration Report	N/A	Auto-on	Visible to Admins Only		Online help has been updated to describe what is included in the Vault Configuration Report with regards to Atomic Security and the default behavior when the system defaults have not been overridden.
Platform	Configuration Management: Review & Deploy Page Notification for Pending Component Updates	N/A	Auto-on	Visible to Admins Only		This feature adds a new warning message alerting users of pending configuration changes during the Review & Deploy process.
Platform	Delegate Access Feature: Enablement Available in all Vaults	N/A	Auto-on	Visible to Admins Only		The Delegate Access feature is now made available in all Vaults. Administrators can enable this feature in Vault Settings (General Settings).
Platform	Platform Data Model Changes	N/A	Auto-on	Visible to Admins Only		With every release, we update the data



						model to better support evolving needs and new feature functionality.
Platform	Query Governor	N/A	Auto-on	Visible to Admins Only		To ensure Vault stability and performance, VQL now enforces constraints on expensive VQL queries. In this release, the FIND clause no longer supports leading wildcards. This change affects API v22.3+, and existing integrations are not affected.
Platform	Scheduled Data Exports: Update Scheduled Start Time	N/A	Auto-on	Visible to Admins Only		Admins can update the scheduled start time of the scheduled data export job.
Platform	Improved Error Handling for Signature Page Generation	High	Auto-on	Visible to All Users		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.
Platform	Person Object: Duplicate Person Record Detection	Medium	Auto-on	Visible to All Users		Vault can detect duplicate Person records upon their creation. Admins may review and edit duplicate matching criteria in the Settings tab.
Platform	Pre-Populated Values in Document Workflow Field Prompts	Medium	Auto-on	Visible to All Users		Vault now pre-populates document field values in Start and Task step field prompts and single verdict prompts in workflows on a single document when values are present in the related document field.
Platform	30-minute Upgrade	Low	Auto-on	Visible to All Users		Show a dialog shortly before a Vault is unavailable for a scheduled release. Send an email to Service Availability Notification subscribers when the Vault is available.
Platform	Add Delegates to a User: Performance Optimization	Low	Auto-on	Visible to All Users		This feature optimizes the performance of the user drop-down selection when adding new delegates. A banner is displayed to administrators on the Active Delegations page when optimization is in progress.
Platform	Control Charts	Low	Auto-on	Visible to All Users		This feature allows users to visualize report data as a control chart.

Platform	Enterprise Home Page: New Grid View	Low	Auto-on	Visible to All Users	The My Vaults page supports a new Grid view listing Vault memberships in a tabular format.
Platform	Freeze Headers and Columns in Document Grid Layout	Low	Auto-on	Visible to All Users	When viewing document search results in the grid layout, the column headers are now frozen so they are always visible when scrolling vertically. Users also have the option of freezing columns.
Platform	Multi-Document Viewer UI Updates	Low	Auto-on	Visible to All Users	This feature makes several user experience enhancements to the multi-document viewer including how users can complete verdicts.
Platform	Notifications: Read & Unread status	Low	Auto-on	Visible to All Users	This feature adds a Read and Unread status for each web notification. Users can mark unread notifications as Read from the Notifications panel and Notifications page.
Platform	OCR Extended Language Support	Low	Auto-on	Visible to All Users	Vault is extending Optical Character Recognition (OCR) support to include files containing non-English text.
Platform	Saved Views on Dynamic Tabs	Low	Auto-on	Visible to All Users	When using the “Show in tab” option on a related list, users are now able to save any additional search criteria applied within that dynamic tab.
Platform	User Mention Notifications Only Sent for New User Mentions	Low	Auto-on	Visible to All Users	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.
Platform	Adding Section to Binder in Outline View Confirmation Dialog	N/A	Auto-on	Visible to All Users	When adding a section to a binder in Outline View, the function to add the section now occurs through a dialog.
Platform	Document Content Reindex	N/A	Auto-on	Visible to All Users	In preparation for upgrades to the Vault search engine in 23R1, the content of all documents will be reindexed over the course of several weeks following the 22R3 release.
Platform	Document Related	N/A	Auto-on	Visible to All Users	Several document-related configuration



		Configuration Settings Tracked in Audit Trail				settings now have audit events that display in the System Audit History.
	Platform	Enterprise Home Page: Card View Redesign	N/A	Auto-on	Visible to All Users	The Enterprise Home page's card view has an enhanced user interface that allows users to quickly find the right vault to open
	Platform	Exported Binders: Audit Trail File Naming	N/A	Auto-on	Visible to All Users	When users export a binder with an audit trail, Vault names the audit trail file based on the latest export version.
	Platform	Precision Highlighter	N/A	Auto-on	Visible to All Users	Highlighting search terms within search results now bolds matching search terms beyond the exact terms typed into the search box, and terms that match because of synonyms are now highlighted.
	Platform	Suppressing Attachment Renditions on Single/Bulk Document/Object Records	N/A	Auto-on	Visible to All Users	Vault now suppresses the rendering of document and object record attachment renditions. Attachment renditions are rendered once the user navigates to the attachments section of the doc info / object record page.
	Platform	Vault Java SDK Service Account	N/A	Auto-on	Visible to All Users	Vault will enable the "Run as Java SDK Service Account" feature in General Settings > Vault Java SDK, and custom Vault Java SDK code will execute as the new Java SDK Service Account. Vault Admins can disable the setting after the 22R3 release. Audit trails reflect this change, and events will be logged as Java SDK Service Account on behalf of {username}. The Java SDK Service Account user appears in the Users & Groups tab and audit trails and does not count against user licensing. SDK audits will be logged as "java_sdk_service@{domain} on behalf of {user}". In 23R1, this feature will be auto-on without the ability to disable the setting.
	Platform	What's New Page Content Update for 22R3	N/A	Auto-on	Visible to All Users	Updates the What's New informational page, highlighting new usability features.
	Platform	Checklists: Performance Improvements for Respondent UI	Low	Support	None	With this release, customers have the option to improve the performance of the checklist respondent UI by batch saving

						the responses instead of saving each response.
	Platform	Select All Option for Complex Relationship	Low	Support	None	This enhancement allows users to select all rows in the Record Selection Dialog when adding records to a related object section that represents a complex relationship between two objects.
Quality	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	LIMS	Consumables Static Data Build	Medium	Auto-on	Visible to Admins Only	You can now define the consumables used in Lab Methods. Includes reagents, standards and equipment. Allows for purchasing consumables from external suppliers as well as preparing reagents and standards in-house.
	LIMS	Lab Test Set, Lab Sample, & Batch Review	High	Auto-on	Visible to All Users	You can now review a Lab Test Set, Lab Sample, and Batch with a focus on reviewing any exceptions. The Batch review brings together all quality considerations including any quality events related to the batch as well as the results against the registered specification. *This feature may not be validated in pre-release Vaults.
	LIMS	LIMS Calculations	High	Auto-on	Visible to All Users	You can now define calculated Lab Result Definitions that can reference Lab Result Definitions from the same Lab Method, another Lab Method, or reference a Calculation Constant. Calculated results are generated when Lab Tests enter the In Review state type.
	LIMS	Making Revisions to Lab Results	High	Auto-on	Visible to All Users	You can now make changes to a Lab Result after the Lab Test has been evaluated against the Control and Release Specification Criteria, but you must provide a Change Reason and eSignature in order to commit your changes.
	LIMS	Static Data Versioning	High	Auto-on	Visible to All Users	Static data records now use specific versions rather than a pointing to the latest effective version.
	LIMS	In-Process Material Testing	Medium	Auto-on	Visible to All Users	Adds the ability to define materials as in-process intermediates and relate those to

						primary materials (e.g. bulk product materials). When batches of a primary material are created, Vault LIMS can automatically create related batches of intermediate materials for in-process control testing based on defined specifications.
	LIMS	Instrument Static Data Build	Medium	Auto-on	Visible to All Users	You can now define the instruments used in Lab Methods. Allows for taking instruments off-line.
	LIMS	Lab Method Inputs Definition and Selection	Medium	Auto-on	Visible to All Users	Facilitates the selection and application of consumable and instrument inputs to test sets.
	LIMS	Reopen Lab Test: Manage Lab Sample & Batch States	Medium	Auto-on	Visible to All Users	Vault LIMS has added the ability to Reopen a Lab Test after the test has completed. Additionally, as Lab Tests change states, the state of the associated Lab Sample and Batch are updated appropriately.
	LIMS	Sample Location Tracking: Shipments	Medium	Auto-on	Visible to All Users	A Lab Sample can now have its location tracked as a shipment.
	LIMS	Vault LIMS	N/A	Auto-on	Visible to All Users	Static data management capabilities and test execution interface, for early adopters only.
	LIMS, QMS, QualityDocs, Station Manager, Surveillance, Training, Validation Management	Quality Data Model Changes	N/A	Auto-on	Visible to All Users	With every release, we update the data model to better support evolving needs and new feature functionality.
	QMS	Set Role Permissions on Related Object	High	Configuration	Visible to Admins Only	Allows Admins to configure an entry or user action that will assign an application role, such as Viewer, on a related object record to a user or users assigned to a defined role on the current object record.
	QMS	Batch Release Templates & Automation	Medium	Configuration	Visible to Admins Only	Reduces the manual overhead associated with the batch release process by providing the capability to defining Batch Release Templates and use the Create Batch / Lot Disposition Record action to create new Batch / Lot Disposition records from a Batch Release Template. This feature also includes a new action, Populate Related Quality

						Events, used to automatically find any Quality Events associated to the batch that is being disposed and eliminate the need for users to manually associate Quality Event records
	QMS	Complaints: Generate Document, Effectiveness Check, & External Notification Feature Support	Medium	Configuration	Visible to Admins Only	This feature extends support for the three Generate Document actions, the Create Effectiveness Check, and the External Notification feature to also support the standalone Complaints data model.
	QMS	Complaints: Relationship Automation, Recurrence Check, & Checklist Support	Medium	Configuration	Visible to Admins Only	This feature extends support for Relationship Automation, Recurrence Check, and Checklists features to also support the standalone Complaints data model. This feature will automatically provision objects to support Checklists on the Complaint object.
	QMS	Duplicate Detection Check	Medium	Configuration	Visible to Admins Only	Allows Admins to configure Duplicate Checks, replacing the complex manual process of identifying a duplicate Complaint with an intelligent search functionality and user interface.
	QMS	External Notification: Support for Standard & Custom Object Types on Quality Event & Audit Objects	Medium	Configuration	Visible to Admins Only	Adds support for standard and custom object types on Quality Event and Audit Objects with the External Notification feature.
	QMS	Set From Email Attributes on Complaint Emails	Low	Configuration	Visible to Admins Only	External Notifications sent for Complaints or Medtech Complaints on the Quality Event object now support the reply to functionality as well as customizable from email addresses.
	QMS	Part, Asset & Service Data Model Updates	Low	Auto-on	Visible to All Users	New standard objects have been created to replace the object types of the Context object.
	QMS	Standalone Complaints Data Model	Low	Auto-on	Visible to All Users	With this feature, QMS now supports the Complaints process as a standalone data model separate from Quality Events. This will allow customers to manage their Complaints Lifecycle separate from the Quality Event Lifecycle.
	QMS	Quality Team Assignments: Update Audit Log to Display	N/A	Auto-on	Visible to All Users	When Quality Team updates are made, the audit log will now record "System on behalf of" instead of just the System user.

		the User who Performed the Team Assignment Update				
QualityDocs		Process Navigator: Show Associated Process Documents	Low	Auto-on	Visible to All Users	Adds a checkbox option in the Documents section of the Process Navigator detail page that expands the scope of the list to include documents either associated with the current process navigator hierarchy or its immediate parent and children processes.
QualityDocs, Station Manager, Training		Quality Relationships Document Information Panel	Low	Auto-on	Visible to All Users	Allows users to easily view existing quality specific document relationships to Process Navigator Hierarchies, Stations and Training Requirements. Users can also create or remove these relationships from this panel.
Training		Option Not to Issue Quiz for Document Revision Training	Medium	Auto-on	Visible to Admins Only	Allows an Admin to determine whether a Quiz is included when a Training Assignment is issued due to Document Revision.
Training		Instructor-Led Training: Simplified Experience	Medium	Configuration	Visible to Admins Only	A redesign of the Classroom Training experience. Introduces a new interface that drastically decreases setup complexity.
Training		Quiz: Hide Missed Questions	Medium	Configuration	Visible to Admins Only	Ability to hide correct or incorrect answers so that Learners can't share results with others.
Training		Disallow Quiz Design Population for Classroom Training Requirements	Medium	Auto-on	Visible to All Users	Users will be prevented from populating the Quiz Design field on a Classroom Training requirement. Note: This does not remove the ability to add a Quiz to a Classroom TR; it simply enforces that a Quiz is added in the correct place, rather than through the Quiz Design field.
Training		Prevent Delegate Completion	Medium	Auto-on	Visible to All Users	Prevents a Delegate user from completing Training on behalf of a Learner.
Validation Management		Vault Validation Management	High	Support	Visible to Admins Only	Vault Validation Management is a new application added to the Vault Quality suite currently available to customers participating in the early adopter program. The application helps organizations manage and execute paperless validation across validation disciplines including: Computerized Systems Validation (CSV), Facility, Equipment, and Utility (FUE)

						<p>commissioning and qualification, process validation, cleaning validation, and method validation. This first release includes the core data model and automation to help manage the validation inventory, entities, and requirements (user, functional, and design specifications). Another key feature included in the initial release is an intuitive user interface to help validation professionals author, review, and pre-approve test scripts before they can be executed. Test script authors can add, copy, and delete setup steps and execution steps to ensure that applicable requirements are challenged effectively. Also included is the paperless test execution experience where pre-approved test scripts consisting of setup steps and execution steps can be executed by one or more assigned executors.</p> <p>*This feature may not be validated in pre-release Vaults.</p>
Regulatory	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	RIM Publishing	Taiwan eCTD DTD 1.0 Publishing & Validation	High	Configuration	Visible to Admins Only	Supports the TW FDA v1.1 (DTD 1.0) specification. Users can now create Content Plans and generate submissions that are compliant with TW FDA v1.1 specification. Vault validates these submissions based on the corresponding TW FDA v1.0 Validation Criteria Version.
	RIM Publishing	US FDA Validation Criteria v4.4 Support	High	Configuration	Visible to Admins Only	With this release, Vault Submissions Publishing supports the US FDA validation criteria v4.4
	RIM Publishing	Reference Leaf UI	Medium	Configuration	Visible to Admins Only	With this release we are providing users with an interface to set a content plan item as a reference leaf.
	RIM Publishing, RIM Registrations, RIM Submissions, RIM Submissions Archive	22R3 RIM Data Model Changes	N/A	Auto-on	Visible to All Users	With every release, we update the data model to better support evolving needs and new feature functionality.
	RIM Registrations	DADI Output Report	High	Configuration	Visible to Admins Only	Creates a new report available from the Regulatory Objective that aggregates



						variation and product data for entry into the DADI form.
RIM Registrations	EUDAMED UDI Business Rule Validation	High	Configuration	Visible to Admins Only		With this release, UDI submissions can be validated against business rules published by the European Commission to surface issues that would result in a rejection by EUDAMED.
RIM Registrations	Activity Country Dependency Enhancements	Medium	Configuration	Visible to Admins Only		This feature allows admins to define more specific country dependencies for planned changes. A new trigger will run at the time of Activity-Registration record creation to check against these more specific rules, allowing Activity Dependency records to only be created where specific Product, Product Variant, and Packaging records are impacted.
RIM Registrations	XEVMPD Support for Investigational Products	Medium	Configuration	Visible to Admins Only		Extends XEVMPD functionality to Investigational Medicinal Products, including the management of investigational medicinal product data, data aggregation, and gateway submission.
RIM Registrations	IDMP / DADI Data Model Updates	N/A	Auto-on	Visible to Admins Only		Updates source objects, output objects, and the data model algorithm supporting IDMP per EU IG v2.1 and the DADI form for human variations.
RIM Registrations	EUDAMED UDI XML Generation Updates	High	Auto-on	Visible to All Users		EU UDI submissions are now generated using the EUDAMED XML Schema v2.0.4. Also, the XML generated by Vault now includes source values supplied for enumeration fields even if the values are invalid, which will result in validation errors and make troubleshooting easier.
RIM Registrations	Bulk Create Activities, Submissions, & Regulatory Objectives Wizard Linking Enhancement	Medium	Auto-on	Visible to All Users		This feature will link new Regulatory Objectives and Submissions to existing Activities where an impact has been identified when the CASRO wizard is run and new Activities are not being created. This will allow customers to complete their affiliate reviews prior to creating other related records to ensure they are needed and complete.
RIM Submissions	Create Content Plan as Inactive	Medium	Configuration	Visible to Admins Only		A new configurable checkbox is available on the Create Content Plan and Content

						Plan Items system action. When configured, all Content Plan and Content Plan Item records are created in the Inactive lifecycle state except for Content Plan Items where the source Content Plan Item Template records have 'Create as Active' set to true.
RIM Submissions	Inactive Content Plan Records Cleanup Job	Medium	Configuration	Visible to Admins Only		A new daily job, Delete Inactive Content Plans, is available. The job deletes inactive Content Plan and Content Plan Item records which meet specific deletion criteria.
RIM Submissions	Update Set Version Locking on Matched Documents Action	Medium	Configuration	Visible to Admins Only		A new configurable checkbox 'Include Latest Lockable State Version' is available for the locking action types on the Set Version Locking on Matched Documents user action. When configured, the Content Plan/Content Plan Item action locks the latest lockable state versions of the matched documents instead of only the latest steady state version.
RIM Submissions	Content Plan Token Support for Submission Fields	Medium	Auto-on	Visible to All Users		This enhancement supports tokenization of Submission text and object reference fields on select Content Plan and Content Plan Item fields.
RIM Submissions	Dispatch Global Content Plan Harmonization: Application Relationships	Medium	Auto-on	Visible to All Users		The dispatch global content plan action is updated to use and copy to Application relationships for the target submissions when the Enable Application Relationships flag is enabled.
RIM Submissions	Drag & Drop Documents from Desktop to Content Plan Item	Medium	Auto-on	Visible to All Users		Users can drag and drop one or more files from a file explorer to a Content Plan Item in the Content Plan Viewer to upload and create documents in Vault and match to the Content Plan Item. The document creation and matching progress for each document is tracked in live time with a toast dialog, which allows users to stay within the Content Plan Viewer or navigate to other pages within Vault while the process completes. Furthermore, if duplicate detection is turned on in the Vault, existing documents with the same checksum as a dropped file will be

						matched instead of creating duplicate documents.
	RIM Submissions	Content Plan Creation Update to Set Language for Submission	Low	Auto-on	Visible to All Users	Content Plan creation logic has been updated to set the Language for Submission field on Content Plan Item records in repeating language sections.
	RIM Submissions	Display Document File Type Icons in the Content Plan Viewer	N/A	Auto-on	Visible to All Users	The Content Plan viewer has been updated to leverage the document type icon to display for each matched document (eg. PDF, Word, Excel, etc.)
	RIM Submissions, RIM Submissions Archive	Set Blank Active Dossier Item Country Status	Medium	Configuration	Visible to Admins Only	The Set Active Dossier Item Country Status action has been updated to allow configuration of a blank value to clear the country status when an objective is rejected or withdrawn.
	RIM Submissions Archive	New Submissions Archive Viewer	Medium	Admin Checkbox	Visible to Admins Only	In this release a new Submissions Archive Viewer has been added. The new user interface allows to streamline the review process with advanced searching, filtering and document viewing capabilities.
	RIM Submissions Archive	EAEU Import Updates	N/A	Auto-on	Visible to All Users	This update to the RIM Submissions Archive EAEU dossier type submission display supports the latest amendments to the Rules for Registration and Examination of Medicinal Products for Medical Use in EAEU.
Training	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	Study Training	Training Matrix Builder	Medium	Configuration	Visible to Admins Only	Allows an authorized user to rapidly assemble the training needs for a given Study by specifying the training materials that each study team member needs to complete training on using an intuitive, guided process.
Vault Connections	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	ClinOps<->RIM	RIM to Clinical Operations: Transfer of All Document Versions to Clinical	Medium	Admin Checkbox	Visible to Admins Only	Adds the ability to transfer all steady state and superseded versions of a document that occur within a 5-minute Job run window.
	ClinOps<->RIM	RIM/Clinops: Improve Transaction Error Handling	Low	Auto-on	None	Allows for inbound jobs to persist data

						that was successful, even if a job completed with errors.
	Safety<>ClinOps	Safety/Clinops: Studies	Medium	Configuration	Visible to Admins Only	The Safety / Clinical Operations connection will automate the creation and updates of the Study and Study Registration (Countries) objects from Clinical Operations vault to the Safety Vault.
<b>Medical</b>	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	MedComms	High Resolution Presentation Slides for CRM & Engage	Low	Admin Checkbox	Visible to Admins Only	In this release, Vault allows high resolution generation of CLM Presentation Slides for use with CRM and Engage.
	MedComms	Automated Image Rendition Setting Removal	N/A	Auto-on	Visible to Admins Only	We have removed the Application Setting checkbox for “Enable Automated Image Renditions” and made the “Enable enhanced PSD file image conversion” Application Setting available for use. Users can now create a maximum of 25 Automated Image Rendition types.
	MedComms	Product & Country Become Shared Fields	N/A	Auto-on	Visible to Admins Only	The Product (product__v) and Country (country__v) document fields are now shared document fields.
	MedComms	Related ISI & Related PI Relationships Added to Base Document Type	N/A	Auto-on	Visible to Admins Only	This feature adds the new standard Related ISI and Related PI relationship types to the Base document type and makes them available for use on all document types.
	MedComms	Asynchronous Auto Publish to CRM for Approved Email Fragments	Low	Auto-on	Visible to All Users	Vault automatically creates email fragments asynchronously, enhancing the Auto Publish to CRM for Approved Email Fragments feature.
	MedComms	Medical Data Model Changes	N/A	Auto-on	Visible to All Users	With every release, we update the data model to better support evolving needs and new feature functionality.

## Change Log

*This feature list is subject to change prior to the 22R3 release. Change tracking is effective as of October 3rd, 2022.*

Date	Change	Impact
02 Dec 2022	Added the following features: - "BRD updates for Mobileshareactionconfig component" - "BRD updates for Mobiletab component"	The RIA now includes a list of all features in 22R3.
18 Nov 2022	Added the following feature: - "Reopen Lab Test: Manage Lab Sample & Batch States"	The RIA now includes a list of all features in 22R3.
04 Nov 2022	Updated the Enablement of the "Display Document File Type Icons in the Content Plan Viewer" feature	The RIA now includes up to date Enablements.
28 Oct 2022	Updated the Enablement and Default Impact of the "Increment # Expected from Matched Documents" feature	The RIA now includes up to date Enablements and Default Impacts.
24 Oct 2022	Added link to the 22R3 release notes.  Updated the Feature Name of "Clinical Creation of Documents from Email Attachments" to "Email to Vault: Create Documents from Attachments"  Updated the Enablement of the "Glossary Terms" feature  Added the following feature: - "Network Connection for Medical Inquiry"	The RIA now includes a list of all features in 22R3, up to date Enablements and Feature Names, and a link to the 22R3 release notes.
21 Oct 2022	Updated the Enablement, Default Impact, and Description of the "Select All Option for Complex Relationship" feature  Added the following features: - "RIM/Clinops: Improve Transaction Error Handling"	The RIA now includes a list of all features in 22R3 and up to date Enablements, Default Impacts, and Descriptions.
14 Oct 2022	Updated the Enablement of the "Object Reference Fields in Formulas" feature  Added the following features: - "Vault Java SDK Service Account" - "Prevent Duplicate Suggested Links"	The RIA now includes a list of all features in 22R3 and up to date Enablements.
11 Oct 2022	Updated the Enablement of the "ClinOps/CDMS: Study Pause" feature Updated the GxP Risk of the "Scheduled Data Exports: Update Scheduled Start Time" feature Updated the Description of the "Query Governor" feature	The RIA now includes up to date Enablements, GxP Risks, and Descriptions.



<p>07 Oct 2022</p>	<p>Added the following features:</p> <ul style="list-style-type: none"> <li>- "Adding Section to Binder in Outline View Confirmation Dialog"</li> <li>- "What's New Page Content Update for 22R3"</li> <li>- "Outbound Email Address for Persons"</li> <li>- "HVO Lookup Field Support in Reports"</li> <li>- "Vault CRM to PromoMats Connection"</li> <li>- "User Mention Notifications Only Sent for New User Mentions"</li> </ul> <p>Removed the "Product &amp; Country Become Shared Fields" feature from the Commercial application family.</p> <p>Updated the Feature Name of the following features:</p> <ul style="list-style-type: none"> <li>- "Making Changes to Lab Results" changed to "Making Revisions to Lab Results"</li> <li>- "Test, Sample, &amp; Batch Review" changed to "Lab Test Set, Lab Sample, &amp; Batch Review"</li> </ul> <p>Updated the Enablement of the "Set Version Locking on Matched Documents Action" feature.</p> <p>Updated the Description of the following features:</p> <ul style="list-style-type: none"> <li>- "Content Plan Creation Update to Set Language for Submission"</li> <li>- "Set Blank Active Dossier Item Country Status"</li> <li>- "Display Document File Type Icons in the Content Plan Viewer"</li> <li>- "Content Plan Token Support for Submission Fields"</li> <li>- "Dispatch Global Content Plan Harmonization: Application Relationships"</li> <li>- "Lab Test Set, Lab Sample, &amp; Batch Review"</li> </ul>	<p>The RIA now contains a list of all features in 22R3, and up to date Feature Names, Descriptions, and Enablements.</p>
<p>03 Oct 2022</p>	<p>Initial RIA Published</p>	<p>N/A</p>