

# Veeva Vault Vault 20R2 Release Impact Assessment

The Release Impact Assessment (RIA) documents the new capabilities introduced in Vault in 20R2 that may affect a customer's vault. We release a version of the RIA in advance of the general release. On July 14th, the Validation Impact Assessment, which contains validation information for new features in 20R2, will be available in the Veeva Compliance Docs (VeevaDocs) vault. Refer to the Enablement and Default Impact for each feature to determine the visibility and configuration requirements. On July 6th, the [20R2 Release Notes](#) will be available. Refer to the release notes for additional details about each feature and data model changes in your vault.

**Revision Date:** 04 Aug 2020

*This feature list is subject to change prior to the 20R2 release. We will begin tracking changes on June 22nd, 2020.*

<b>Feature:</b>	Name of the feature introduced in 20R2
<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	RBSM: Clinical Risk Assessments	Low	Configuration	Visible to Admins Only	This feature allows users to curate a library of selectable risks, create re-usable risk assessment templates, and generate study-specific risk assessments. By tracking impact, probability, and detectability on study-specific risks, along with an overall risk score on the study-specific risk assessment, users can understand specific areas of risk and how this study compares to the risk of other studies.
	CTMS	Yuzu: CTN Enhancements	Medium	Support	None	With this release, we've made various enhancements to Yuzu: Clinical Trial Notifications including improved error handling for XML validation, format improvements for generated documents, JIS Level 1 and 2 character set validation for CTN data, and a user action to trigger the Change Log job immediately. *This feature is only available to Early Adopters.
	CTMS, SiteConnect, Study Startup, Vault Payments, eTMF	Vault Clinical Docs Update	N/A	Auto-on	Visible to Admins Only	This feature adds new artifact records to the Vault Clinical Docs Model so that Admins can map certain document types with more granularity.
	CTMS, Study Startup, Vault Payments, eTMF	Investigator Initiated Studies in Vault Clinical Operations	Medium	Configuration	Visible to Admins Only	This feature allows users to track the internal processes of Investigator Initiated Studies, including proposal review and approval, study planning and execution, publication tracking, and document tracking.
	CTMS, Study Startup, Vault Payments, eTMF	Pre-Save Field Defaulting	Low	Auto-on	Visible to All Users	This feature improves defaulting behavior for document metadata field values populated by Vault based on values in other fields. Previously, the controlled field did not update until changes were saved. Now, the controlled field values update dynamically to reflect changes to the controlling field in real-time while the user is editing.
	CTMS, Study Startup, Vault Payments, eTMF	Clinical 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.

CTMS, Study Startup, Vault Payments, eTMF	Organization Document Reuse Update	N/A	Auto-on	Visible to All Users	This feature updates the document reuse functionality to leverage the "Organization" document field rather than the "Contributor's Organization" document field. *Auto-on in vaults with streamlined reuse for organization-level documents configured.
CTMS, Study Startup, eTMF	EDL Automation for Study Personnel, Organizations & Products	Medium	Configuration	Visible to Admins Only	This feature allows for the creation of EDL items from template based on the addition of Person, Organization, and/or Product records to a study, and links them to open milestones based on template configuration. *Available for configuration in vaults with the Clinical EDL Template Refactor and Person & Organization Migration features enabled.
Vault Payments	Payments: Generate Payable Items User Action	Medium	Configuration	Visible to Admins Only	The Generate Payable Items action allows Vault Payments customers to generate payable items by manually evaluating the existing Payable Events against the current approved Fee Schedules for a site.
eTMF	Rule Set Override	Medium	Auto-on	Visible to Admins Only	This feature allows customers to change the conditions under which the transfer occurs. Users can further constrain the documents and records that are applicable to send or alter the direction in which content is transferred. *This feature may not be validated in pre-release vaults.
eTMF	Simple TMF Transfer	Medium	Configuration	Visible to Admins Only	Simple TMF Transfer provides users with the ability to transfer content without requiring large amounts of configuration work. TMF Reference model documents and study data are sent from the CRO vault to the Sponsor vault. *This feature may not be validated in pre-release vaults.
eTMF	Archive TMF Security	Medium	Support	None	This feature enables study team assignments and new document upload for archived studies. Access to the newly available capabilities for archived studies is controlled by the Manage Archive permission.

	eTMF	Archive TMF User Action & Snapshot	Medium	Support	None	This feature introduces a user action to archive a study, its documents, and its related records in a single automated job. For documents used across multiple studies, Vault creates a study-specific copy, or snapshot, of the document and archives that copy.
	eTMF	Archive: Snapshot CrossLink Documents	Medium	Support	None	This feature ensures that CrossLink documents are protected from further changes when a study is archived. At the moment of archival, Vault automatically creates snapshots of all CrossLink documents to ensure their immutability, while allowing the original CrossLink documents to live on for future use.
	SiteConnect	Site Connect: Site Packages	Medium	Support	None	With this feature, users can create custom regulatory document packages to be sent to Study Sites using SiteVault. SiteVault users will receive documents and document requests. *This feature may not be validated in pre-release vaults.
	Study Startup	Milestone Evolution & Standard Metrics	Medium	Configuration	Visible to Admins Only	This feature introduces industry-standard Global Milestone Types and Global Milestone Offsets to measure key cycle times between milestones. Users can map custom milestone types to these standards, and Vault calculates Cycle Times between completed milestones on a daily basis and recalculates Cycle Times to support historical data. *Available for configuration in vaults with Study Startup.
<b>SiteVault</b>	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	SiteConnect, SiteVault Enterprise, SiteVault Free	Site Packages: SiteVault	Medium	Auto-on	Visible to All Users	This feature enables site users to receive and respond to regulatory document requests directly in SiteVault when working with Sponsors and CROs who are using Vault Site Connect. *This feature may not be validated in pre-release vaults.
	SiteVault Enterprise, SiteVault Free	Easy Source Upload	N/A	Configuration	Visible to Admins Only	This feature dramatically reduces the effort required to get scanned paper source documents ready for monitor

						review in SiteVault.
	SiteVault Enterprise	Site Field is System-Managed	Low	Auto-on	Visible to All Users	This feature adds defaulting behavior for the Site document field.
<b>Commercial</b>	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	MedComms	Unified Medical Inquiry Case Intake Form	Medium	Configuration	Visible to Admins Only	This feature streamlines the data entry process required to create a new Medical Inquiry case by introducing a single Case Input form. Upon save, Vault creates new Case, Case Request, and Case Response object records. *This feature may not be validated in pre-release vaults.
	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.
	Multichannel	China CDN Replication Support	N/A	Configuration	Visible to Admins Only	With this feature, Admins can configure which CRM Engage and CLM content for Chinese customers will be replicated to a China-hosted CDN, improving load times and overall performance for China users. This Vault configuration will be used by a future CRM release.
	PromoMats	Auto Claims Linking: Link Target Custom Actions	Low	Configuration	Visible to Admins Only	This feature updates the Preview action on Link Targets to grant the View permission to standard permission sets automatically. This feature also adds the Remove action to allow users to remove a reference document from a Claim. Users with the Business Administrator Actions, System Administrator Actions, and Vault Owner Actions standard permission sets can use this action automatically.
	PromoMats	Vault Digital Publishing Security Update	N/A	Auto-on	Visible to Admins Only	This feature enhances Vault Digital Publishing configuration to prevent inappropriate configurations and provide configuration validation by adding an additional step to ensure appropriate access to the S3 buckets that are in use.
	PromoMats	Auto Claims Linking: Display Claims in Document Fields	Low	Auto-on	Visible to All Users	With this feature, Vault now displays a list of Claim records in the Document Fields panel of the Doc Info page to indicate which Claims have been used to generate



						Suggested Links and Approved Links on a document.
PromoMats	Auto Claims Linking: Filter by Link Type	Low	Auto-on	Visible to All Users		This feature provides greater focus and efficiency when reviewing references by allowing users to control the visibility of manually created and automatically created links on a document. The new Manual Links and Auto Links filters replace the existing Links filter, and do not impact the visibility of pending Suggested Links, which are filtered separately.
PromoMats	Auto Claims Linking: Link to Claim from Link Annotation Info Card	Low	Auto-on	Visible to All Users		Vault now displays a link to the related Claim record in the Annotation Info card for Suggested Links and Link Annotations created by accepting a Suggested Link. This provides valuable context to reviewers and helps users when troubleshooting results of the Suggest Links action.
PromoMats	Auto Claims Linking: Manually Target Claims	Low	Auto-on	Visible to All Users		When enabled, this feature allows users to select an Approved Claim when manually creating link annotations on documents with non-text content if the Suggest Links action is enabled for the document type. Selecting a Claim record results in a Claim Link, which is a manually-created link annotation with non-editable links to the references defined in the selected Claim.
PromoMats	Auto Claims Linking: Notify User When Suggest Links Completes	Low	Auto-on	Visible to All Users		When the Suggest Links action is initiated, Vault displays a "Generating suggested links..." message. Vault now updates this message to notify the user when the action is completed successfully, fails, or when the Suggest Links action takes longer than 60 seconds.
PromoMats	Auto Claims Linking: Option to Auto Link	Low	Auto-on	Visible to All Users		When a user performs the Suggest Links action, and a Claim or Match Text Variation matches the content exactly, without wildcards, Vault bypasses the Review & Approve step and creates a pre-approved link annotation known as an Auto Link.

	PromoMats	Standard Metrics Fields Now Required	Low	Auto-on	Visible to All Users	With this release, the Global Content Type, Content Creation Currency, and Content Creation Cost fields will be required on all documents. On all existing documents where the Global Content Type, Content Creation Currency, and Content Creation Cost fields are not already populated, these fields will be populated with "Not Specified." This feature also adds four new currencies: AUD, CHF, CYN, and CAD.
Quality	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	QMS	QRM: Process FMEA Assessment Methodology Support	Medium	Configuration	Visible to Admins Only	This release introduces the ability to model Process FMEA (pFMEA) risk assessments within a customer's vault.
	QMS	Risk Management: Detectability Support for Qualitative & Quantitative Risk Matrices	Medium	Configuration	Visible to Admins Only	QMS customers can now implement both Severity x Occurrence style matrices for Quality Risk Management as well as Severity x Occurrence x Detectability matrices within their vaults.
	QMS	Create Related Records: Effectiveness Checks	Low	Configuration	Visible to Admins Only	Vault can now automate the creation of Effectiveness Check records for Quality Events and CAPA Actions.
	QMS	Enablement Change: QMS to Registrations Spark Connection	N/A	Configuration	Visible to Admins Only	Customers who wish to enable the QMS to Registrations Spark Connection can now do so without contacting Vault Support to request the feature. This does not automatically enable the feature, but makes the configuration options available to Admins.
	Training, Station Manager, QMS, QualityDocs	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.
	QualityDocs	Auto-Close Completed MDCCs	High	Configuration	Visible to Admins Only	Customers can now configure their vaults to automatically transition Multi-Document Change Control (MDCC) records to a closed state when all documents in the MDCC have been released or obsolesced.
	QualityDocs	Include Purpose for eSignatures Cascaded from MDCCs to Documents	High	Configuration	Visible to Admins Only	This feature allows for adding purposes when cascading eSignatures from Document Change Controls to



						Documents to be made Effective and Obsolete, manifested on the document's audit trail. Purposes can be added to the eSignature page template.
	QualityDocs	Synchronize MDCC & Document States	High	Configuration	Visible to Admins Only	With this feature, when a Multi-Document Change Control (MDCC) moves through its lifecycle, the state of the documents to be released can be synchronized with the state of the MDCC itself.
	QualityDocs	MDCC: Banner Visibility Update	N/A	Auto-on	Visible to All Users	Vault no longer displays the Document Change Control banner on DCC-governed documents to users with only the Change State or Start Workflow permissions and none of the other four applicable permissions: Edit Document, Edit Fields, Annotate, or Version.
	Training	Training Assignment Lifecycle User Actions	Medium	Auto-on	Visible to Admins Only	Admins can now edit user actions on the Training Assignment lifecycle. This feature is only intended to support the Download Formatted Output user action.
	Training	Classroom Training: Usability Enhancements	Medium	Configuration	Visible to Admins Only	Workflow and Learner task pages are enhanced for the Instructor-Led Training feature. *This feature may not be validated in pre-release vaults.
	Training	Facilitated Training	Medium	Configuration	Visible to Admins Only	This feature enables a Training Admin, or a user with proper access, to give completion credit for Training Assignments on behalf of Learners.
	Training	Power Delete Action for the Training Assignment Object	Medium	Configuration	Visible to Admins Only	This feature introduces a new record action to completely delete a Training Assignment record and its related records. This action is useful for configuration and testing.
	Training	Substitute Training	Medium	Configuration	Visible to Admins Only	This feature allows a Training Requirement to substitute for another Training Requirement. *This feature may not be validated in pre-release vaults.
	Training	Training Nightly Job Performance & Robustness Improvements	Low	Auto-on	Visible to Admins Only	This feature delivers more graceful error handling and internal performance improvements for the Update Training Assignments job which drives Vault Training automation.
	Training	Assignment Details	Medium	Auto-on	Visible to All Users	The Assignment Details lifecycle state is



		Lifecycle State No Longer Updated				no longer updated as a Training Assignment moves through its lifecycle. There is now a lookup field on Assignment Details records that references the parent Training Assignment record's lifecycle state.
	Training	Updated Training Requirement Document Picker Dialog	N/A	Auto-on	Visible to All Users	With this feature, the document selection dialog for Training Requirements is updated with a cleaner user interface.
	Training	E-Learning Technology Standards Support	Medium	Support	None	This feature introduces support for e-learning technology standards AICC and SCORM.
<b>Regulatory</b>	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	RIM Publishing	GCC eCTD DTD 1.1 Publishing & Validation	High	Configuration	Visible to Admins Only	Users in RIM Publishing vaults can now create content plans and generate submissions that are compliant with the GCC v1.5 (DTD 1.1) specification. Vault validates these submissions based on the corresponding GCC v1.4 Validation Criteria.
	RIM Publishing	South Africa eCTD DTD 2.1 Publishing & Validation	High	Configuration	Visible to Admins Only	Users in RIM Publishing vaults can now create content plans and generate submissions that are compliant with the South Africa v3.0 (DTD 2.1) specification. Vault validates these submissions based on the corresponding South Africa v2.1 Validation Criteria.
	RIM Publishing	Switzerland eCTD DTD 1.5 Publishing & Validation	High	Configuration	Visible to Admins Only	Users in RIM Publishing vaults can now create content plans and generate submissions that are compliant with the CH Swissmedic v1.5 (DTD 1.5) specification. Vault validates these submissions based on the corresponding CH Swissmedic v1.5 Validation Criteria.
	RIM Publishing	Thailand eCTD DTD 1.0 Publishing & Validation	High	Configuration	Visible to Admins Only	Users in RIM Publishing vaults can now create content plans and generate submissions that are compliant with the TH FDA v1.0 (DTD 1.0) specification. Vault validates these submissions based on the corresponding TH FDA v1.0/01 Validation Criteria.
	RIM Publishing, RIM	20R2 Regulatory Data	N/A	Auto-on	Visible to Admins Only	With every release, we update the data

Registrations, RIM Submissions, RIM Submissions Archive	Model Updates					model to better support evolving needs and new feature functionality.
RIM Registrations	Verification of Registration Data	Medium	Configuration	Visible to Admins Only		This feature allows Admins to configure a verification workflow to allow users to review and confirm the updates made to registration data as part of the Manage Registered Details wizard. Users must complete workflow tasks to approve updates before Vault commits changes to the registration and registered detail records.
RIM Registrations	Registration History View	Low	Configuration	Visible to Admins Only		Users can extract a report of audit trail data for registrations and registered details, grouped by the regulatory objective that originated the change, to Microsoft Excel. Users can report on a set of Registration records across a specific date range or on a single Registration's entire history.
RIM Registrations	Enablement Change: QMS to Registrations Spark Connection	N/A	Configuration	Visible to Admins Only		Customers who wish to enable the QMS to Registrations Spark Connection can now do so without contacting Vault Support to request the feature. This does not automatically enable the feature, but makes the configuration options available to Admins.
RIM Registrations	QMS to Registrations Spark Connection: Configurable Event Object Types	N/A	Configuration	Visible to Admins Only		Customers can now configure the QMS to Registrations Spark Connection to create regulatory Event records of different object types, better supporting change controls for commercial products versus investigational products.
RIM Registrations	Manage Registered Details for Medical Devices	Medium	Auto-on	Visible to All Users		Customers using Regulatory Objectives as the source of data for the Manage Registered Details wizard can now update and add registration details for medical devices. Customers can now use Object Type Mapping records to ensure that registered details are added using the appropriate object types. *Auto-on in vaults with object type mapping configured.
RIM Registrations	Enhancements to Manage	Low	Auto-on	Visible to All Users		This feature improves the user interface

		Registered Details				in the Manage Registered Details wizard. Navigating within the wizard is clearer, users now see the details they are updating grouped by Registration in addition to Country, and the size of the Add: Registered Details dialog has been increased.
RIM Registrations		Brexit: Remove UK from Centralised Countries for Create Registrations	N/A	Auto-on	Visible to All Users	To align with Brexit, Vault no longer defaults the United Kingdom in the list of EU countries for Centralised Procedures in the Create Registrations wizard.
RIM Registrations		IDMP Phase 1: Algorithms	Medium	Support	None	This feature introduces an aggregation algorithm that will recurse through RIM Registrations data to compile submission data in new IDMP objects. The full IDMP feature set will be delivered across multiple releases.
RIM Submissions		Copy Content Plan with Constraints	Medium	Configuration	Visible to Admins Only	When configuring the Copy Content Plan system action, Admins can now choose whether or not Vault respects the target application and submission's Content Plan Template Constraints when users copy a content plan.
RIM Submissions		Auto-Match Previously Matched Documents to Multiple Submissions Related to the Same Application	Low	Configuration	Visible to Admins Only	This feature allows documents previously matched in the application to be auto-matched to content plan items in a submission in the same application when the "Include Previously Matched Documents" field is set to Yes on the submission.
RIM Submissions		Matched Document Version Locking Entry Criteria	Low	Configuration	Visible to Admins Only	This new entry criteria on the Content Plan Item object lifecycle requires that all matched documents are locked to a steady state version before the content plan item can enter the target state.
RIM Submissions		Archived Document Security in RIM Submissions	Medium	Auto-on	Visible to All Users	This feature makes several enhancements to existing features to account for archived documents and binders, including preventing users from up-versioning archived content plan and Submission Ready binders and preventing document creation from Content Plan Item Templates that reference archived documents.

	RIM Submissions	Copy Content Plan Update	Medium	Auto-on	Visible to All Users	In past releases, when users copied a content plan, Vault incorrectly applied source Content Plan Template Constraints to the target content plan. With this release, Vault now ignores the source content plan's Content Plan Template Constraints when copying a content plan.
	RIM Submissions	Start Multi-Document Workflow from the Content Plan Hierarchy Viewer	Medium	Auto-on	Visible to All Users	Users can send up to 100 matched documents on a multi-document workflow directly from the new Content Plan Hierarchy Viewer introduced in 20R1. The documents added to the workflow will respect the filters applied on Content Plan Items and Matched Documents in the viewer. *Auto-on in vaults with the Content Plan Hierarchy Viewer enabled and an active multi-document workflow configured.
	RIM Submissions	Expand Content Plan Section to View Descendant Records in Viewer	Low	Auto-on	Visible to All Users	The Content Plan Hierarchy Viewer now includes an Expand action that allows users to display all descendant Content Plan and Content Plan Item records within the section at once. To show matched documents, users can expand the Content Plan Item records. *Auto-on for users with the All Object Actions: Execute permission on the Content Plan object in vaults with the Content Plan Hierarchy Viewer enabled.
	RIM Submissions	Additional Content Plan Hierarchy Viewer UI Enhancements	N/A	Auto-on	Visible to All Users	This release includes minor updates to the Content Plan Hierarchy Viewer UI, including a gray document icon for matched document rows, a banner to display active workflow tasks, and additional document fields to display as Matched Document columns. *Auto-on in vaults with the Content Plan Hierarchy Viewer enabled.
	RIM Submissions	Enablement Change: Content Plan Hierarchy Viewer	N/A	Auto-on	Visible to All Users	This release includes an enablement change for the Content Plan Hierarchy Viewer introduced in 20R1. The new viewer will be automatically available for vaults without existing Content Plan records. For vaults that contain Content

						Plan records already, an Admin can enable or disable the new viewer from the Application Settings page.
	RIM Submissions	Merge PDF Error Handling	N/A	Auto-on	Visible to All Users	This feature adds additional details to the Vault notification message when Vault encounters errors while merging content as part of report level content plan publishing. This feature also introduces a new field on the Publishing Validation Criteria object that Admins can set to prevent documents that encounter a given error from merging.
	RIM Submissions Archive	Submissions Archive Reimport	Medium	Configuration	Visible to Admins Only	Users have a new Reimport option to remove the original dossier from a submission and import an updated dossier in a single step.
	RIM Submissions Archive	Submission Join Filters	Low	Admin Checkbox	Visible to Admins Only	Users now have the option to filter which submissions to display in the Submissions Archive Viewer based on the submission's related records. Enabling this feature will deactivate and remove any metadata that was mapped at the time the submission was imported.
	RIM Submissions Archive	Submissions Archive Switzerland (CH) 1.5 Support	Medium	Auto-on	Visible to All Users	RIM Submissions Archive vaults now support importing and viewing Switzerland 1.5 DTD submissions.
	RIM Submissions Archive	Submissions Archive Performance Statistics	N/A	Auto-on	Visible to All Users	The Performance Statistics object now includes two fields to capture the daily Submissions Archive import and view counts. These fields are available on all RIM application vaults but will only be populated in Submissions Archive vaults.
	RIM Submissions Archive	Submission Import with Vault File Manager	Medium	Support	None	This feature allows users to upload submission folders or ZIP files directly from Vault File Manager for import to Submission records in Submissions Archive vaults. *This feature may not be validated in pre-release vaults.
<b>Mobile</b>	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	Station Manager	Enforce Client Permissions on Android	High	Auto-on	Visible to All Users	Station Manager for Android enforces permissions to allow customers to tightly

						control usage of the application within their organization.
	Station Manager	Custom URL & QR Code Support on Android	Low	Auto-on	Visible to All Users	This feature allows customers to generate custom Station Manager URLs for documents. When a manufacturing operator opens these custom URLs on their tablet device, it opens the target document in the Station Manager mobile app.
	Station Manager	Custom URL & QR Code Support on iOS	Low	Auto-on	Visible to All Users	This feature allows customers to generate custom Station Manager URLs for documents. When a manufacturing operator opens these custom URLs on their tablet device, it opens the target document in the Station Manager mobile app.
	Station Manager	Natively Open Embedded Links on Android	Low	Auto-on	Visible to All Users	Users may embed links to QualityDocs documents within other QualityDocs documents. With this feature, tapping an embedded link on Station Manager opens the target document directly within the app if the target document is downloaded to the device.
	Station Manager	Natively Open Embedded Links on iOS	Low	Auto-on	Visible to All Users	Users may embed links to QualityDocs documents within other QualityDocs documents. With this feature, tapping an embedded link on Station Manager opens the target document directly within the app if the target document is downloaded to the device.
	Station Manager	Release to Google Play	N/A	N/A	None	Android Station Manager is now available via Google Play.
<b>Platform</b>	<b>Application</b>	<b>Feature Name</b>	<b>GxP Risk</b>	<b>Enablement</b>	<b>Default Impact</b>	<b>Description</b>
	Platform	Allow Inclusion of KeyInfo in SAML Requests	High	Configuration	Visible to Admins Only	With this feature, SAML Profiles allow inclusion of the KeyInfo element in SAML Requests. Inclusion of KeyInfo will be required when the Vault certificate is rolled over later this year. This feature provides for testing time to ensure the customers' Identity Provider solutions are properly configured to support the new certificate when it is released.

Platform	Separate SAML SSO Configuration for Login & eSignature	High	Configuration	Visible to Admins Only	Vault now supports a new type of SAML profile, eSignature Profiles, specifically for electronically signing documents and object records via SAML. As part of this feature, we also renamed SAML Profiles to Single Sign-on Profiles.
Platform	Document Migration Mode for Vault Loader	Medium	Auto-on	Visible to Admins Only	In Vault Loader, the Object Type Create action for Document Renditions, Document Versions, and Documents, Versions, Roles can now be used without placing the entire vault in Migration Mode.
Platform	Inbound Component Dependency Validation	Medium	Auto-on	Visible to Admins Only	This feature provides component dependency validations during the Configuration Migration Package import and deployment process.
Platform	Updates to Object Workflow & Lifecycle Formula UI	Medium	Auto-on	Visible to Admins Only	This feature updates the formula editor for object lifecycles and workflows. The formula editor is now consistent with the editor available when configuring objects.
Platform	Object & Multi-Document Workflows: Invoke Record Action via a System Action Step	Medium	Configuration	Visible to Admins Only	This feature enables Admins to configure a System Action workflow step that invokes a Vault Java SDK Record Action as part of an object workflow or a multi-document workflow. When the workflow reaches the System Action step, Vault executes the custom Record Action logic.
Platform	Variables for Multi-Document & Object Workflows	Medium	Configuration	Visible to Admins Only	Multi-document and object workflows support configuration of variables to use with decision steps for branching workflows.
Platform	Document Migration Mode API Header	Low	Auto-on	Visible to Admins Only	A new permission, Document Migration, allows users to include a Document Migration Mode header in bulk document API calls. All documents created or updated within this API call behave as if the vault is in document migration mode. Customers no longer need to enable Migration Mode for the entire vault, which can disrupt auto-matching processes such as EDL and Legal Hold.
Platform	Domain Users: Add Vaults in CSV Export	Low	Auto-on	Visible to Admins Only	This feature adds the list of vaults to which users are assigned in the Domain User CSV export.

Platform	Re-establish Vault to Vault Connections	Low	Auto-on	Visible to Admins Only	Admins can reconnect broken Vault to Vault Spark connections without needing to recreate any interaction-related components.
Platform	Spark Integration Rules UI	Low	Auto-on	Visible to Admins Only	Admins can configure Spark Messaging integration rules in the Vault UI. Previously, integration rule configuration was only available through MDL.
Platform	VPK Deployment Order Dependency & Validation	Low	Auto-on	Visible to Admins Only	This feature introduces a new Validate feature at the Inbound Package level that allows the Admin to determine if an Inbound Package has any dependencies that are blocking the deployment of the package. This feature also adds two new endpoints to the REST API.
Platform	Default Search Context	Low	Configuration	Visible to Admins Only	When users log in for the first time or navigate to a tab that is not searchable, such as Home or Dashboards, the search box context defaults to search All Documents. Admins can now specify any document or object tab as the default search.
Platform	Notification Preferences	Low	Configuration	Visible to Admins Only	With this release, Admins can configure four types of notification preferences (Task Notifications, User Mentions, Send as Link, and Shared Views) to help users manage emails coming from Vault. Admins can also set a notification type to Summary to hold messages of this type until the next scheduled email and collate them to send them as a single email.
Platform	Improvements for Long Running Jobs	N/A	Auto-on	Visible to Admins Only	In past releases, Vault only cleaned up long-running non-asynchronous jobs that could not complete after 14 days. Now, Vault will clean up these jobs after three (3) days.
Platform	Rename Permission for Mobile Applications	N/A	Auto-on	Visible to Admins Only	The label for the Enable App Store Configuration permission is now Enable Direct Installation and includes more accurate help text.
Platform	Additional Operators for Document Lifecycle State Entry Actions, User Actions & Entry Criteria	N/A	Configuration	Visible to Admins Only	This feature adds two new operators to the conditions for document lifecycle state user actions, entry actions, and entry criteria: the "is not equal to" operator for



						document type, subtype, and classification, and the "does not include" operator for all object reference fields, including document type, subtype, and classification.
Platform	Custom Job Processors with the Vault Java SDK	N/A	Configuration	Visible to Admins Only		The Vault Java SDK now provides the ability to create custom job processors. After creating a custom job processor and deploying it, SDK Job will appear as a selectable Type when creating a new job definition from Admin > Operations > Job Definitions.
Platform	Shared Lookup Fields for Documents	N/A	Configuration	Visible to Admins Only		Admins can create Lookup type document fields as shared fields and convert existing Lookup fields into shared fields.
Platform	Archived Document Security Enhancements	High	Auto-on	Visible to All Users		Vault prevents users from editing archived documents in any way. Users now need View Archive permission in order to view archived documents or the Archive tab. *Auto-on in vaults with Document Archiving enabled.
Platform	Display Page X of Y & Datetime in PDF Audit Exports	Medium	Auto-on	Visible to All Users		This feature improves audit exports to PDF by including the total page count on each page and adding the audit name, vault name, and datetime to each page.
Platform	Individual Audit Filters	Medium	Auto-on	Visible to All Users		This feature enables users to apply event and user filters to individual document and object audit trails.
Platform	LongText Field Enhancements	Medium	Auto-on	Visible to All Users		This feature allows Admins to create LongText fields, allows users to edit LongText fields in a pop-up dialog on the object record details page, and allows users to export the entire content of LongText fields from lists of records in tabs.
Platform	Multi-Document Workflow: Execute Entry Action & Entry Criteria When Canceling Workflows or Removing Documents	Medium	Auto-on	Visible to All Users		When canceling a multi-document workflow or removing documents, Vault moves documents to the configured Workflow Cancel State and executes entry actions or entry criteria.
Platform	Save Version to Vault Without Ending Collaboration Session	Medium	Auto-on	Visible to All Users		Users participating in a collaborative authoring session can now save the latest working version to Vault without ending the collaborative authoring session for

						themselves or other users. In addition, Vault notifies editors when the collaboration session is ended. *Auto-on in vaults configured with Collaborative Authoring.
	Platform	XML Rendering	Medium	Auto-on	Visible to All Users	This feature provides the ability to generate a viewable rendition for XML files. XML files are rendered in text format and can be reviewed and annotated within Vault.
	Platform	Add Change Type Action to Related Record	Low	Auto-on	Visible to All Users	Users can now change the object type of related object records using the Actions menu within related record sections on an object record details page.
	Platform	Add Copy Record Action to Related Record	Low	Auto-on	Visible to All Users	Users can now copy a related object record directly from the Actions menu within related record sections on an object record details page.
	Platform	Auto-Place Brought Forward Image Annotations	Low	Auto-on	Visible to All Users	With this release, brought forward annotations on images and text can be automatically placed based on the page and coordinates in the source version. If the coordinates or page do not exist in the new version, Vault places the annotations at the page level.
	Platform	Change to Maximum Length for Link Field	Low	Auto-on	Visible to All Users	This release reduces the maximum length of the Link (link__sys) object field from 1,500 characters to 255 characters.
	Platform	Configure Auto-Open Safelist for Vault File Manager	Low	Auto-on	Visible to All Users	Organizations can add VFM File Security Policy object records to determine which file extensions will open automatically after the download completes. If there is not an object record for a file extension, instead of the file opening automatically, the Vault File Manager client displays to the user when the download is complete. This release includes list of safelisted file extensions by default, but Admins with access to this object can edit these records. *Auto-on in vaults with Vault File Manager enabled.
	Platform	Constrain Object Reference Search	Low	Auto-on	Visible to All Users	With this feature, Vault constrains object reference field values in filter value searches on object tabs. These filters

						now only return values that are included in a user's search results.
	Platform	Enhanced Document Number & ID Search	Low	Auto-on	Visible to All Users	This feature enhances searching for documents by Document Number in two ways. With partial document number searches, users can search for the beginning, middle, or end of a document number to get a match. Additionally, in Advanced Search, the Document Number field now supports multiple document numbers, making it easier to search for more than one specific document.
	Platform	Include Prompts with Filters in Report Builder	Low	Auto-on	Visible to All Users	This feature adds prompts to the filter section of the report builder. Users can decide whether a filter should be determined at runtime by selecting a checkbox.
	Platform	Indicate When Annotations Hidden by Filters	Low	Auto-on	Visible to All Users	When a user views a document with annotations that are hidden, Vault displays an alert message to the user which includes a count of the currently hidden annotations.
	Platform	Minimum Match Logic: Strict Matching	Low	Auto-on	Visible to All Users	When searching documents or records with multiple search terms, strict matching will require most of the user's search terms to match. Results that only have one of the matching terms will not be considered relevant. This will return a more precise set of results to the user and help to reduce the number of results as the number of search terms increases.
	Platform	Or Filter Logic	Low	Auto-on	Visible to All Users	This feature allows users to determine whether AND or OR logic should apply between two filters or prompts. Users can also add parentheses to group certain filters together.
	Platform	Support Priority Multi-Document Workflow Fields in Reports	Low	Auto-on	Visible to All Users	This feature adds support for the Task Verdict Comment and Task Verdict Reason fields for multi-document workflows in Workflow with Document reports.
	Platform	Audit Captures Source Record ID in Copy	N/A	Auto-on	Visible to All Users	When users select the Copy Record action, the Event Description in the new

						record's audit trail now includes the source record's name.
Platform	Collaborative Authoring: Alert Box for Documents Being Edited	N/A	Auto-on	Visible to All Users		When a user views a document that is being edited by another user via collaborative authoring, Vault displays a message in the document viewer to indicate that what is displayed may not be the latest content. This message is dismissed when the user clicks within the viewer area.
Platform	Default Profile Image for System User	N/A	Auto-on	Visible to All Users		This feature adds a Veeva Logo as the user image for system-owned users, such as the System user and the Application Owner user.
Platform	EDL Item Upload Visibility Update	N/A	Auto-on	Visible to All Users		To access the Upload action on EDL Item records, Vault now requires users to have Edit permission on the EDL Item object. The user must also be in an Editor role when sharing settings are enabled.
Platform	Enablement Change: Localize Vault to Dutch	N/A	Auto-on	Visible to All Users		In past releases, the Veeva Vault UI supported Dutch for customers that requested it through Veeva Support. Now, Dutch is available automatically.
Platform	Full EDL Job Match	N/A	Auto-on	Visible to All Users		The Match EDL Items to Documents job is optimized to run more efficiently. The first time that Vault runs the Match EDL Items to Documents job after the 20R2 release, every document in the vault will be evaluated for matches against all active EDL Item records, and it is possible that Vault will match or unmatch older EDL Items and documents. After this job runs fully once, it will return to incremental updates.
Platform	Localize Vault to Hungarian	N/A	Auto-on	Visible to All Users		The Veeva Vault UI now supports Hungarian.
Platform	Move Merge Anchors to Create Anchor Tool	N/A	Auto-on	Visible to All Users		In past releases, the Merge Anchors button appeared when users selected the Link tool. Now, this button appears when users select the Create Anchor tool. This update changes the permissions users need to merge anchors.
Platform	Platform Data Model	N/A	Auto-on	Visible to All Users		With every release, we update the data

		Changes				model to better support evolving needs and new feature functionality.
	Platform	Reference Constraint Performance	N/A	Auto-on	Visible to All Users	This feature improves performance when users edit document fields that are controlled by dynamic reference constraints. As a result, users are now required to have at least Read access to the join object in order to view and select records in the controlled field.
	Platform	Restore Resizing to Annotation Comments Field	N/A	Auto-on	Visible to All Users	The ability to manually resize the Comment field in the Create Annotation and Edit Annotation dialogs was removed in a prior release. This feature restores that ability with minor improvements.
	Platform	Sharing Settings UI Enhancements for Objects	N/A	Auto-on	Visible to All Users	This feature updates the Sharing Settings UI for objects to be consistent with Sharing Settings for documents.
	Platform	State Change Job Improvements	N/A	Auto-on	Visible to All Users	Document State Change jobs now only check if there is an active workflow on the affected document version. Prior to this change, Vault would not perform the state change if there was an active workflow on any document version unless an Admin canceled the workflow manually.
	Platform	Unified Navigation Behavior when Clicking Object References in Document Fields	N/A	Auto-on	Visible to All Users	With this feature, when a user clicks an object record link in a document field, Vault now always takes the user to a standalone object record detail page, even if the user has access to a custom tab or the Business Admin page.
	Platform	Vault File Manager: Check In & Check Out Enhancements	N/A	Auto-on	Visible to All Users	With this release, Vault no longer opens new browser tabs when using Vault File Manager to check out and check in. *Auto-on in vaults with Vault File Manager enabled.
	Platform	Atomic Security for Documents: Active Workflow Actions	High	Support	None	This feature provides more granular control for actions on active document workflows. It also removes automatic access to these actions for the Workflow Initiator.
	Platform	Atomic Security for Documents: Lifecycle User Actions	High	Support	None	This feature provides more granular control for document lifecycle state user actions and deprecates the Start Workflow and Change State permissions

						in the security matrix. *This feature may not be validated in pre-release vaults.
	Platform	Auto-Number Envelope Record for Multi-Document Workflow	Medium	Support	None	Admins can configure multi-document workflows where Vault auto-generates the Name value for the Envelope record.
	Platform	CJK Optimized Record Search	N/A	Support	None	This feature improves search results for customers with Japanese, Korean, or Chinese text in object records.

## Change Log

*This feature list is subject to change prior to the 20R2 release. We will begin tracking changes on June 22nd, 2020.*

Date	Change	Impact
04 Aug 2020	Added the "Reference Constraint Performance" feature.	The RIA now includes a list of all features in 20R2.
24 Jul 2020	Added the "Organization Document Reuse Update" feature.	The RIA now includes a list of all features in 20R2.
10 Jul 2020	Removed the "This feature may not be validated in pre-release vaults." note from the Description of "Site Field is System-Managed".	The RIA now includes up to date Descriptions.
06 Jul 2020	Added a link to the 20R2 release notes.  Renamed "Standard Metrics: Make Mandatory" to "Standard Metrics Fields Now Required" and updated the Description to better reflect the feature's functionality.	The RIA now includes a link to the 20R2 release notes and up to date Feature Names and Descriptions.
30 Jun 2020	Added the "EDL Item Upload Visibility Update" feature.  Renamed "Clinical Network: Simple Transfer" to "Simple TMF Transfer", updated the Description to better reflect the feature's functionality, and removed "Veeva Clinical Network" from the Applications.  Renamed "Clinical Network: Rule Set Override" to "Rule Set Override", updated the Description to better reflect the feature's functionality, and updated the Applications from "Veeva Clinical Network" to "eTMF".  Renamed "Site Packages: Vault Clinical" to "Site Connect: Site Packages" to better reflect the feature's functionality.	The RIA now includes up to date Feature Names, Applications, and Descriptions, and a list of all features in 20R2.
26 Jun 2020	Updated the Enablement of "Clinical Network: Simple Transfer" from "Auto-on" to "Configuration".  Updated the GxP Risk of "Vault Digital Publishing Security Update" from "Low" to "N/A".	The RIA now includes up to date Enablement and GxP Risks.
23 Jun 2020	For the "Submission Import with Vault File Manager" feature: - Updated the Enablement from "Configuration" to "Support" - Updated the Default Impact from "Visible to Admins Only" to "None"	The RIA now includes up to date Enablement and Default Impact.

15 Jun 2020	Initial RIA Published	N/A
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