

Veeva Vault Vault 21R2 Release Impact Assessment

The Release Impact Assessment (RIA) documents the new capabilities introduced in Vault in 21R2 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 21R2, will be available in the Veeva Compliance Docs (VeevaDocs) vault on July 12th. Refer to the Enablement and Default Impact for each feature to determine the visibility and configuration requirements. On July 6th, the 21R2 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: 25 Jun 2021

This feature list is subject to change prior to the 21R2 release. We will begin tracking changes on June 21st, 2021. Updates will stop on August 7th, 2021.

Feature:	Name of the feature introduced in 21R2
GxP Risk:	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.
Enablement Setting:	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.
Default Impact:	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	CDMS & Clinical Operations Vault Connection: Protocol Deviations	High	Configuration	Visible to Admins Only	This feature allows studies utilizing the standard Protocol Deviations object in Vault CDMS to transfer both manually entered and programmable protocol deviations from Vault EDC to Vault CTMS via the CDMS & Clinical Operations Vault Connection.
	CTMS	Conditional Actions on Trip Report Questions	Medium	Configuration	Visible to Admins Only	This feature improves the entry of follow up items and issues by allowing CRAs to easily see which Trip Report Question Responses require follow up items and issues. For multiple-choice questions, Admins can specify which answers require users to create or link a related follow up item or issue record.
	CTMS	Add Yuzu Japanese CTN to the Application Settings Page	Low	Auto-on	Visible to Admins Only	This feature allows Admins to enable and disable the Yuzu Japanese CTN feature from the Application Settings page.
	CTMS	Relabel Question Comment Required Object to Answer with Conditional Requirements	N/A	Auto-on	Visible to Admins Only	The Question Comment Required (question_comment_required__v) object is relabeled to Answer with Conditional Requirements to support the Conditional Actions on Trip Reports feature.
	CTMS	Support for EU Regulatory Agency Issue Notification Tracking	N/A	Auto-on	Visible to Admins Only	This feature adds support for tracking EU Regulatory Notifications on the Issue (pdv__ctms) object. Within an Issue object record, users can specify a Notification Type (Serious Breach, Unexpected Event, and Urgent Safety Measure) and track when the notification should be reported to the EU/EEA Member States. Admins will need to add new fields to the Issue Page Layout in order to fully utilize this feature.
	CTMS	Support for Subject Informed Consent Forms	N/A	Auto-on	Visible to Admins Only	This feature adds support for tracking Subject Informed Consent Forms (ICFs). With the new Subject Informed Consent Form object, users can select a Site Effective Informed Consent Form and a Subject, and then specify the date the Subject signed that ICF in the Signature Date field. A Subject Informed Consent

						Form field has also been added to the Monitored Informed Consent Form object. Admins will need to configure page layouts to fully utilize this feature.
	CTMS, SiteConnect, 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.
	CTMS, SiteConnect, Study Startup, Vault Payments, eTMF	USN Picker Search Improvements	N/A	Auto-on	Visible to All Users	With this feature, Clinical Operations users can now search across multiple criteria in the USN Picker. Searched terms now match across the following columns: Site Name, USN, Country, State/Province, and Address.
	CTMS, Study Startup, eTMF	Milestone-Specific Expected Documents	Medium	Configuration	Visible to Admins Only	This feature updates expected document template configuration to allow Admins to indicate that expected documents are created only for specific types of milestones. Once created from template, these documents are linked to and match to an Owning Milestone of that type while still linked to additional milestones based on existing behavior.
	CTMS, Study Startup, eTMF	Veeva eConsent Authoring in Clinical Operations	Medium	Configuration	Visible to Admins Only	With this feature, Veeva eConsent customers will be able to create, edit, and maintain eConsent forms from within their Clinical Operations Vault.
	Vault Payments	Clinical Budget Tracking	Medium	Configuration	Visible to Admins Only	This feature adds support for tracking study-, country-, and site-level planned budgets and budget categories, as well as the ability to track expenses against those budgets and the corresponding budget categories.
	eTMF	Content Field for Inbox Documents	High	Auto-on	Visible to Admins Only	This feature allows customers to secure documents in the Document Inbox as blinded or unblinded with the Content (blinding__v) document field. This feature is auto-on for customers with the Content (blinding__v) field on the Base Document Type.
	eTMF	TMF Bot: Model Training	Medium	Auto-on	Visible to Admins Only	This feature allows Admins to create, train, deploy, and archive machine learning models in Clinical Operations vaults.

						*This feature may not be validated in pre-release vaults.
eTMF	Archive Study From Any State	Medium	Configuration	Visible to Admins Only		This feature introduces a new Initiate Study Archival action that Admins can configure on any Study lifecycle state.
eTMF	TMF Bot: Auto-Classification	Medium	Configuration	Visible to Admins Only		With this feature, Vault automatically classifies documents uploaded to the Document Inbox in vaults with a trained and deployed Document Classification Trained Module. *This feature may not be validated in pre-release vaults.
eTMF	Clinical Operations & Regulatory Vault Connection: Streamlined Reuse Support	Medium	Auto-on	Visible to All Users		This feature selectively ignores streamlined document reuse functionality for CrossLink documents created via the Clinical Operations & RIM Vault Connection. This allows customers to leverage document reuse functionality for any document type, subtype, or classification, even documents within the scope of the Clinical Operations & RIM Vault Connection.
eTMF	Attachments for TMF Transfer	N/A	Auto-on	Visible to All Users		With this feature, customers on eTMF vaults can now transfer document attachments via TMF Transfer.
Study Startup, eTMF	New State Types for Soft Deletion	Low	Auto-on	Visible to Admins Only		This feature adds the standard Delete Requested, Soft Delete One Version, and Soft Delete All Versions state types to all lifecycles to support workflow configurations for deletion.
Study Startup, eTMF	Quality Issue Assignee Filtering By Object Type	Low	Auto-on	Visible to All Users		This feature allows Quality Issue Assignees to be filtered by either the system filtering (users who have access to the document) or VQL filters for each Object Type. Previously, this filtering could only be done for the object as a whole. Previously added VQL Filters on Quality Issue Object Types will start being used with the 21R2 release.
SiteConnect	Document Reconciliation	Medium	Configuration	Visible to Admins Only		This feature provides Veeva Site Connect customers with automated and streamlined document reconciliation between a Sponsor/CRO's eTMF vault and a site's eISF in SiteVault.

	SiteConnect	Site Connect: Additional Vault Clinical Docs Support	N/A	Auto-on	Visible to Admins Only	This feature adds support to transfer new document types via Veeva Site Connect.
	SiteConnect	Veeva eConsent Transfer with Site Connect	N/A	Auto-on	Visible to All Users	With this feature, Site Connect customers will be able to exchange Veeva eConsent documents with SiteVault.
	Study Startup	Send Surveys to Non-Users	Medium	Configuration	Visible to Admins Only	This feature introduces an option to email invitations to complete a Checklist for specific target objects. Non-Vault users can then click on a link in that email to complete the Checklist in Vault.
SiteVault	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	SiteConnect, SiteVault Enterprise, SiteVault Free	New Exchangeable Document Types on Connected Studies	N/A	Auto-on	Visible to All Users	This feature adds support to transfer the following new document types from a sponsor or CRO's vault for a Connected Study: * Ancillary Committee Response * Clinical Study Report * Contract * Insurance * Protocol Clarification * Procedure Manual * Protocol Summary of Changes * Protocol Synopsis * Regulatory Authority Response
	SiteVault Enterprise, SiteVault Free	Digital Delegation Log Updates	High	Support	Visible to Admins Only	This feature provides a digital and compliant way to record all of the significant study-related duties that have been delegated to study staff by the principal investigator as part of the Delegation of Authority log. *Only available in vaults with the Extensible SiteVault Permissions feature enabled. This feature may not be validated in pre-release vaults.
	SiteVault Enterprise, SiteVault Free	Extensible SiteVault Permissions	High	Support	Visible to Admins Only	This feature updates how user permissions are managed in SiteVault. To provide additional granularity in user permissions, additional access can be defined at the level of the research organization, site, and study. *This feature may not be validated in pre-release vaults. *This feature is not available in pre-

						release vaults.
SiteVault Enterprise, SiteVault Free	SiteVault Settings Framework	Medium	Configuration	Visible to Admins Only		This framework will enable users with appropriate permissions to enable and disable certain (future) features for a research organization, site, or study. *This feature may not be validated in pre-release vaults.
SiteVault Enterprise, SiteVault Free	SiteVault Data Model Updates	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.
SiteVault Enterprise, SiteVault Free	Optional State Change for Send Document via Clinical Network Action	N/A	Configuration	Visible to Admins Only		With this feature, Admins can configure an automatic document state change when a document is sent to a sponsor or CRO for a Connected Study.
SiteVault Enterprise, SiteVault Free	Set Context in Vault Selector	High	Auto-on	Visible to All Users		With this feature, a user's research organization and sites are displayed in the Vault Selector. Users with appropriate permissions can select a research organization to view data across all sites associated with the research organization. *This feature may not be validated in pre-release vaults.
SiteVault Enterprise, SiteVault Free	Veeva eConsent Early Adopter Feedback & Enhancements	High	Auto-on	Visible to All Users		This feature includes the following enhancements to Veeva eConsent in SiteVault: * Site users receive a notification when a participant declines an eConsent form in MyVeeva for Patients, and users can cancel or resend the declined form as needed. * Site users can view, search, filter, and report on eConsent form responses collected from participants in MyVeeva for Patients during the eConsent process. * Site users can view and share a preview of the eConsent form as it would appear to a participant during the consent process.
SiteVault Enterprise, SiteVault Free	Edit Checks for Patient & Participant Data Quality	Medium	Auto-on	Visible to All Users		This feature adds support to ensure the quality of the data that is entered and maintained on patient and study participant records.
SiteVault Enterprise, SiteVault Free	Expanded Language Support	N/A	Auto-on	Visible to All Users		This feature provides additional support

						for users to view a translated version of SiteVault.
	SiteVault Enterprise, SiteVault Free	Language Field Alignment	N/A	Auto-on	Visible to All Users	With this feature, document language is standardized and consolidated under a new Language (translated_language__v) document field. The new field is added to several document types.
	SiteVault Enterprise, SiteVault Free	Prompt for Fields on Upload to Document Inbox	N/A	Auto-on	Visible to All Users	A quicker way to upload a group of study files into SiteVault! When dropping files into the Document Inbox, users can set initial values for Study and other common fields.
	SiteVault Enterprise, SiteVault Free	Single Source of Truth for Person Profiles	Medium	Support	None	This feature ensures that each person in a research organization only needs to manage one set of profile documents no matter how many sites they are associated with in SiteVault. *This feature may not be validated in pre-release vaults.

Commercial	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	MedComms	Support Long Text Request Details field for Medical Inquiry	N/A	Auto-on	Visible to Admins Only	With this feature, users can map fields in the CRM Data Sharing functionality for Medical Inquiry to the long text type. Long text fields are required to share fields that are longer than a standard text field, which is limited to 1,500 characters.
	MedComms, PromoMats	CRM Approved Links Data Model Change	Low	Auto-on	Visible to Admins Only	This data model change supports a future CRM Approved Links feature.
	MedComms, PromoMats	Data Model Change: Multi-Select CRM Product Fields	Low	Configuration	Visible to Admins Only	Admins can update the CRM Product, CRM Detail Group, and CRM Detail Group fields in PromoMats and MedComms to be multi select or single select. These fields are single select by default. This data model change supports a future CRM feature.
	MedComms, PromoMats	Create Fragment Includes Additional CRM Product Fields	Low	Auto-on	Visible to All Users	With this release, the Create Fragment feature copies any standard CRM Product fields (CRM Org, CRM Product, CRM Product Detail Group) used on a source document to the generated email fragment, as part of the Veeva Approved Email functionality.

	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	Material ID	High	Configuration	Visible to Admins Only	This feature adds a Material ID field that is unique to each document that can be used for submission to a health authority. The ID is automatically updated if a second submission is required. This allows customers to upversion documents past steady state, to submit to health authority again with a new unique Material ID.
	PromoMats	eCTD Compliance Package 2253 Form Update	Medium	Configuration	Visible to Admins Only	When generating an eCTD Compliance Package, users can configure Vault to automatically select "Final" on the 2253 Form in Post Marketing Compliance Packages when the Center field is set to CBER - APLB.
	PromoMats	Modular Content: Approval Document	Low	Configuration	Visible to Admins Only	When working with Content Module objects, users can now generate a document containing key elements of the module and supporting components. This document can then be submitted through a document review process to approve the module for use.
	PromoMats	Modular Content: Rich Text Fields	N/A	Auto-on	Visible to All Users	With this release, the text fields in Content Module objects use the new Rich Text field type, allowing basic formatting on the text. Existing unformatted text is unaffected and both the plain and rich text are accessible via the API.
	PromoMats, RIM Publishing	PromoMats & RIM Vault Connection	High	Configuration	Visible to Admins Only	This feature introduces part of a PromoMats & RIM Vault Connection for eCTD Submissions, reducing the time it takes to prepare material for submission to the FDA. This includes automating creation of Contact, Submission, Content Plan, and CrossLinks in the RIM vault and creation of Application & Applicant in the PromoMats vault.
Quality	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	QMS	Relationship Automation for Quality Objects: Quality	Medium	Configuration	Visible to Admins Only	Users may establish simple, bi-directional relationships between two records of the

		Events, Audits, CAPAs				same object (Quality Events, Audits, CAPAs supported) optionally indicating the nature of the relationship (similar to, duplicates / is duplicated by, etc). Relationship natures are configurable.
	QMS	Batch Release Process Support	Low	Configuration	Visible to Admins Only	Vault QMS can now support business teams managing product Lot Disposition / Release evaluations. Customers can now log each usage decision / disposition they produce within the vault, collecting information used to arrive at the disposition within one place: a Lot Disposition record.
	QMS	Generate Quality Document from Object Record Action	Low	Configuration	Visible to Admins Only	This action for Quality Event & Audit Documents creates a document and links it to the record on which the action is executed. The action can be executed by a user, or automatically. Documents are created from formatted outputs.
	QMS	Quality Teams: Restore Memberships UI Update	N/A	Auto-on	Visible to All Users	The 'Restore' UI element that users click to restore membership of a Quality Team role to the current membership of a parent record's Quality Team has been changed from a link to an icon.
	QMS, QualityDocs, Station Manager, Surveillance, Training	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	Enhanced Periodic Review for Documents	High	Configuration	Visible to Admins Only	Enhances the existing periodic review process by adding auto-start functionality.
	QualityDocs	Enablement Change: Extensible Controlled Copy	N/A	Admin Checkbox	Visible to Admins Only	In past releases, Extensible Controlled Copy was only available to customers who requested it from Veeva Support. In this release, Extensible Controlled Copy is now enabled through an Admin checkbox.
	QualityDocs	Process Navigator: Navigation Drawer & Favorites	High	Auto-on	Visible to All Users	Enhances the Visual Navigation feature with a left hand Navigation Drawer and Favorites functionality.
	Station Manager	Station Manager: Capture Document Usage	Medium	Auto-on	Visible to Admins Only	Vault can now create activity records to capture the viewing of documents in the Station Manager mobile application.
	Surveillance	Adverse Event Reporting	High	Auto-on	Visible to All Users	Adds follow-up reports, on-demand

		Enhancements				validation, and notifications for truncated fields in Adverse Event Reporting.
	Surveillance	Health Canada Adverse Event Reporting	High	Auto-on	Visible to All Users	This feature allows users to submit Adverse Event Reports to Health Canada.
	Surveillance	Reportability Assessment Management	High	Auto-on	Visible to All Users	Allows Admins to set up questions to determine the Severity of a complaint and thus determine the Reportability of the Adverse Event to health authorities.
	Surveillance	Rename Reportable Event to Adverse Event Report	N/A	Auto-on	Visible to All Users	This feature renames the Reportable Event Object (reportable_event__v) to Adverse Event Report (adverse_event_report__v).
	Training	Allow Learner Choice For Substitute Training	Medium	Configuration	Visible to Admins Only	A Training Administrator can determine whether the system automatically assigns substitute training (current behavior) or whether a Learner has the option, or choice, of selecting a substitute training. If a Learner is given the choice, the Learner can choose an appropriate training from a list of training assignments.
	Training	Assign Effective Version for Training	Medium	Configuration	Visible to Admins Only	With this feature, a Learner can be assigned the Effective version of documents for Training if the Training Requirement references an Issued document.
	Training	On the Job Training Type	Medium	Configuration	Visible to Admins Only	A new training type that allows Learners to be evaluated and assessed on a particular skill or topic by an Evaluator.
Regulatory	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	RIM	PromoMats & RIM Vault Connection	High	Configuration	Visible to Admins Only	Admins can now create a connection between a PromoMats vault and a RIM vault to automatically create submissions based on the eCTD Compliance Package in PromoMats.
	RIM Publishing	US FDA eCTD Validation Criteria v4.0 Support	High	Configuration	Visible to Admins Only	With this release, RIM Submissions Publishing vaults now support the US FDA eCTD Validation Criteria v4.0. *This feature may not be validated in pre-release vaults.
	RIM Publishing	Archived Document Security in RIM Submissions	Medium	Auto-on	Visible to All Users	Vault no longer includes archived documents in published outputs as part of

						the Submissions Publishing or Report Level Content Plan Publishing processes.
RIM Publishing	Propagate Fields from Source to Archived Documents	Medium	Auto-on	Visible to All Users		Vault can now populate any fields configured within a RIM Submissions Archive vault when a submission is published as long as the source document contains fields with the same namespace.
RIM Publishing, RIM Registrations, RIM Submissions, RIM Submissions Archive	RIM Reference Model	Medium	Configuration	Visible to Admins Only		This release introduces a standard reference model hierarchy for RIM document types. It is used for the Active Dossier Template mapping to document types. The Clinical to RIM connection has also been updated to consider RIM Reference Model Mappings when creating CrossLinks in RIM if no valid document type reference lookups are found.
RIM Publishing, RIM Registrations, RIM Submissions, RIM Submissions Archive	Auto-Create Commitment Application Joins	Low	Admin Checkbox	Visible to Admins Only		A new setting on the Application Settings page enables Vault to create Commitment Application join object records automatically when users create or update the Related Application field on Commitment records.
RIM Publishing, RIM Registrations, RIM Submissions, RIM Submissions Archive	21R2 Regulatory 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.
RIM Publishing, RIM Registrations, RIM Submissions, RIM Submissions Archive	Quality to RIM Vault Connection Data Model Update	N/A	Auto-on	Visible to Admins Only		This feature adds the data model supporting the Quality to RIM Vault Connection to all RIM vaults, although the connection only works in RIM vaults with the Registrations application.
RIM Publishing, RIM Submissions	Sequential Pagination of TOC	Medium	Configuration	Visible to Admins Only		Users can now create a TOC with overall page numbering when merging and publishing the Report Level Content Plan.
RIM Registrations	Updates to IDMP Accelerators to Support UDI	Medium	Auto-on	Visible to Admins Only		This feature splits the Automatically Generate Registered Details Records setting on the Application Settings page into two separate settings for Registered Site Role records and Registered Packaged Product records. Vault now generates Registered Packaged Product records with the same object type as their

						source Registered Packaging records if there is a matching object type name.
RIM Registrations	Activity Country Dependencies	Medium	Configuration	Visible to Admins Only		Admins can now define country to country dependencies for planned changes.
RIM Registrations	IDMP Process Automation	Medium	Configuration	Visible to Admins Only		This feature introduces automation into the IDMP process. When users generate IDMP data from a Regulatory Objective record, Vault identifies applicable medicinal products, creates the product data submission for each applicable medicinal product, and generates the IDMP elements.
RIM Registrations	IDMP: Registered Packaging to Medicinal Product Registration Mapping	Medium	Configuration	Visible to Admins Only		This feature introduces a new action that maps Registered Packaging records to the related Medicinal Product Registration records, extending the IDMP Accelerators feature that was introduced in 21R1.
RIM Registrations	Registration Verification Improvements	Medium	Configuration	Visible to Admins Only		The registration verification workflow process is enhanced to let Admins choose how to allocate workflow tasks and in which states the verification workflow should run. Vault can also support verification when users edit Registration records or registered details directly.
RIM Registrations	XEVMPD Attachment-Only Submission	Medium	Configuration	Visible to Admins Only		Vault can now generate and submit XEVPRM for attachments without product data.
RIM Registrations	UDI Source Data Model	N/A	Auto-on	Visible to Admins Only		This feature introduces medical device-related data model changes to allow Vault to capture UDI attributes for EUDAMED and GUDID.
RIM Registrations	Create Related Records: Application Country Scope	Medium	Auto-on	Visible to All Users		This feature adds a new Activity Scope Level, Country and Application, to the Create Related Records wizard. This feature also renames the existing Country scope to Country, Application and Product to align with its existing behavior.
RIM Registrations	Create Related Records: Restrict Submission & Regulatory Objective Joins	Medium	Auto-on	Visible to All Users		When users run the Create Related Records wizard from an Impact Assessment Report, Vault now applies validation logic before creating Submission and Regulatory Objective join records to prevent invalid relationships.

RIM Registrations	XEVMPD Procedure Number	N/A	Auto-on	Visible to All Users	This feature updates the XEVMPD data aggregation algorithm to populate the MRP/DCP/EMA Number from the IDMP Procedure Number field on the Registration record.
RIM Submissions	Copy Into Content Plans	Medium	Admin Checkbox	Visible to Admins Only	Users working in the Content Plan Hierarchy Viewer can now drag and drop to copy a content plan item or content plan section from one content plan to another.
RIM Submissions	Extend Content Plan Duplicate Submission Join Detection	Medium	Auto-on	Visible to All Users	This feature extends the submission join duplicate detection during the Copy Content Plan action to additionally consider the XML fields on the submission joins.
RIM Submissions	Asynchronous Content Plan Actions: Locking & Indicator	Low	Auto-on	Visible to All Users	This feature introduces locking that prevents users from initiating an asynchronous Content Plan action when there is a conflicting action already processing on the same Content Plan. The controlled actions include the Content Plan update, Split Content Plan Item, asynchronous state change, and the new Copy into Content Plan. This feature also updates the Content Plan Hierarchy Viewer header to add a status icon to inform users if Vault is processing any of these actions on the current Content Plan.
RIM Submissions	Collapse Action in Content Plan Hierarchy Viewer	Low	Auto-on	Visible to All Users	This feature adds a new Collapse action for Content Plan records in the Content Plan Hierarchy Viewer to allow users to collapse all descendant Content Plan and Content Plan Item records within a content plan section at once, including matched document rows.
RIM Submissions	Dynamically Adjust Content Plan Row Height to Fit Text	N/A	Auto-on	Visible to All Users	In the Content Plan Hierarchy Viewer, the row height for Content Plan rows now adjusts dynamically to fit text, so that cell text is never cut off vertically when wrapped. Users can no longer adjust row heights manually.
RIM Submissions, RIM Submissions Archive	Active Dossier	Medium	Configuration	Visible to Admins Only	RIM customers with RIM Submissions and Submissions Archive can configure Vault to track and manage documents

						that are active for a product in a given market.
	RIM Submissions Archive	Submissions Archive: Taiwan 1.0	Medium	Auto-on	Visible to All Users	Users in Submissions Archive vaults can now import submissions using the Taiwan 1.0 DTD for eCTD submissions.
	RIM Submissions Archive	Correspondence in Viewer to Consider Dossier Status	Low	Auto-on	Visible to All Users	Vault now takes into account values in the Dossier Status field when displaying correspondence documents in the Submissions Archive Viewer.
	RIM Submissions Archive	Submissions Archive Documents Created as System	N/A	Auto-on	Visible to All Users	Users no longer need Create permission for binders and documents on the Submissions Archive document type. Vault now creates Submission Archive documents as System.
Mobile	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	Station Manager	Capture Document Usage on Android	Low	Configuration	Visible to Admins Only	Creates records in Vault when documents are viewed in Station Manager.
	Station Manager	Capture Document Usage on iOS	Low	Configuration	Visible to Admins Only	Creates records in Vault when documents are viewed in Station Manager.
	Station Manager	Recent Documents Enhancements on Android	Low	Auto-on	Visible to All Users	Recently viewed documents are available from within the document viewer, making it easy to flip back and forth between related documents.
	Station Manager	Recent Documents Enhancements on iOS	Low	Auto-on	Visible to All Users	Recently viewed documents are available from within the document viewer, making it easy to flip back and forth between related documents.
Platform	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	Platform	Automate Guest Invites to Azure AD from Vault	High	Configuration	Visible to Admins Only	With this release, Admins can enable Vault to automatically send a Guest Invite to external users to add them to their domain, allowing the external users to edit and collaborate on documents using the Office 365 integration.
	Platform	Domain Admin Support for Cross-Domain Users	High	Configuration	Visible to Admins Only	In previous releases, cross-domain users could not be Domain Admins. This feature adds support for cross-domain users as Domain Admins, and will be released in 21R2.0a.

						*This feature may not be validated in pre-release vaults.
Platform	Enforce Use of HTTPS When Configuring SAML & OAuth 2.0 Profiles	High	Configuration	Visible to Admins Only		When configuring new SAML profiles and OAuth 2.0 profiles or updating existing ones, Admins must now use the HTTPS protocol rather than the HTTP protocol. *This feature may not be validated in pre-release vaults.
Platform	Copy Workflow	Medium	Auto-on	Visible to Admins Only		This feature allows workflow administrators to copy an object or document workflow (formerly multi-document workflow).
Platform	Display the Unclassified Document Type in Admin	Medium	Auto-on	Visible to Admins Only		The Unclassified document type (labeled 'Undefined' in existing vaults) now appears in document type admin. Admin users can assign fields and document type groups to the Unclassified document types, and control the Create Document permissions for this document type.
Platform	Promote to Production	Medium	Auto-on	Visible to Admins Only		This feature introduces a one-time vault action which allows a Vault owner to promote their initial vault, a Pre-Production Vault, to a Production Vault. *This feature may not be validated in pre-release vaults.
Platform	Support for DAC Lifecycle Role Allowed Group in Document Workflows	Medium	Admin Checkbox	Visible to Admins Only		Workflow initiators can now select and add users from the Allowed Group in a Dynamic Access Control (DAC) lifecycle role in a specific-lifecycle document workflow (formerly multi-document workflow). This feature can be enabled in Vault Settings > General Settings > Workflow.
Platform	Auto-Removal of Documents from Workflows	Medium	Configuration	Visible to Admins Only		This feature allows for automatic removal of documents from document (formerly multi-document) workflows via a Content Action step using verdict or field values. The auto-removal content action must be configured with conditions and should be preceded by a Decision step to avoid removal of all documents in the workflow.
Platform	Display Start Workflow Actions in Most Frequently Used Actions	Medium	Configuration	Visible to Admins Only		This feature allows configuration of Start Workflow actions to be displayed in the

						All Actions menu and as Most Frequently Used actions.
	Platform	Prompt for Document Fields in Document Workflow Verdicts	Medium	Configuration	Visible to Admins Only	Workflow administrators can now configure document fields as part of a document workflow (formerly multi-document workflow) task verdict.
	Platform	Read & Understood Workflows	Medium	Configuration	Visible to Admins Only	This feature allows workflow administrators to create and use Read & Understood workflows as document workflows (formerly multi-document workflows). Applications or customers using our existing Read & Understood workflows automatically receive the ability to create this new R&U workflow.
	Platform	Restrict Document Workflow to a Single Document	Medium	Configuration	Visible to Admins Only	This feature allows workflow administrators to configure a document workflow (formerly multi-document workflow) to only run on one document. Such workflows are not shown in bulk views like Library or Favorites and are shown only on document user action menus.
	Platform	Flash Reports Timeout Behavior	Low	Auto-on	Visible to Admins Only	Vault now automatically blocks flash reports that time out three times in a row. Vault notifies flash report owners, who can then unblock the report by making edits to the report definition.
	Platform	JSON Binding Annotations: User-Defined Model & Property	Low	Auto-on	Visible to Admins Only	This feature allows Vault Java SDK developers to annotate getters and setters on a UserDefinedClass interface and use the JsonService to serialize and deserialize a JSON string with that class. The JsonService supports JSON Objects and Arrays for serialization/deserialization and supports annotations for existing JsonValue types.
	Platform	Related Object Section Criteria VQL Filters	Low	Auto-on	Visible to Admins Only	This feature enhances the Related Object sections of objects to filter based on Criteria VQL, similar to Related Document section filters. Admins can now define much more powerful and flexible filters using criteria VQL.
	Platform	Smart Filter Enablement in	Low	Auto-on	Visible to Admins Only	Admins can now enable or disable smart

		Search Settings				filtering on the Search Settings page. In previous releases, smart filtering was only available through Veeva Support.
	Platform	Unify Lifecycle Stage Group Configuration	Low	Auto-on	Visible to Admins Only	Admins can now create, access, edit and delete object and document lifecycle stage groups from one location at Admin > Configuration > Lifecycle Stage Groups.
	Platform	VQL for Multi-Document Workflows	Low	Auto-on	Visible to Admins Only	This feature allows VQL developers to query for data associated with document workflows (formerly multi-document workflow). To utilize this feature, users must have the new Application: Workflow: Query permission. By default, all new and existing Vault Owners, System Administrators, and Business Administrators will have this permission.
	Platform	Checklists: Welcome Notification Templates	Low	Configuration	Visible to Admins Only	Checklist provisioning now supports welcome notification templates for each Checklist Type. The template includes tokens that reference fields on Checklist Design records, giving non-Admin designers a way to provide Checklist-specific text for welcome notifications sent to respondents.
	Platform	Display Next Workflow Start Dialog When Current Workflow Ends	Low	Configuration	Visible to Admins Only	Workflow administrators can now configure a workflow End step to automatically display a workflow start dialog when the current workflow ends.
	Platform	Restrict Workflow Owner from Receiving a Task	Low	Configuration	Visible to Admins Only	This feature allows workflow administrators to restrict workflow owners from receiving an object or document workflow (formerly multi-document workflow) task.
	Platform	Scheduled Data Exports	Low	Configuration	Visible to Admins Only	Admins can now receive an automated daily CSV file export of their Vault object record data and document metadata directly on their Vault File Staging FTP folder or their Amazon S3 Bucket.
	Platform	Admins Can Edit All Document Field Labels	N/A	Auto-on	Visible to Admins Only	Before this release, Admins could not edit the Labels on all standard (__v) fields, even though this was possible via MDL and the bulk translation tools. We have removed this constraint.
	Platform	Admins Can Edit All Picklist	N/A	Auto-on	Visible to Admins Only	In previous releases, Admins could not

		Labels & Picklist Value Labels				edit the labels on all standard (___v) picklists and picklist values, even though this was possible via MDL and the bulk translation tools in Vault. This feature removes this constraint.
	Platform	Date & DateTime Fields Support in Document Workflow Decisions	N/A	Auto-on	Visible to Admins Only	Workflow administrators can now configure conditions based Date and DateTime fields in a document workflow (formerly multi-document workflow) Decision step.
	Platform	Enable Action UI Setting	N/A	Auto-on	Visible to Admins Only	<p>The "Enable Action UI" setting is available in Admin > Settings > User Interface Options. It is also available in advance in the 21R1 release on June 16, 2021 with the setting name: "Enable Action UI for 21R2 Release". This single setting enables a number of UI enhancements that make using Vault faster and easier. It is enabled by default, but Admins may disable it in advance or any time during 21R2.</p> <p>Action UI includes the following UI enhancements:</p> <ol style="list-style-type: none"> 1) Action Bar 2) Doc Info UI Enhancements 3) Annotate UX Refresh 4) Notifications: Enhanced Notification UI 5) UI Styling Updates 6) Action Menu Button Icon Change 7) Display Start Workflow Actions in Most Frequently Used Actions
	Platform	Expression Enhancement for Update Document Field in Lifecycle & Workflow	N/A	Auto-on	Visible to Admins Only	This feature adds additional functions and operators to allow workflow administrators to build more comprehensive expressions, used for updating document fields inside a lifecycle event action, entry action, or document workflow (formerly multi-document workflow) content action step.
	Platform	Feature Flag Confirmation Dialog in Vault	N/A	Auto-on	Visible to Admins Only	This feature adds a confirmation message that displays when a Vault Admin enables a feature that cannot be disabled once enabled on the Settings page.
	Platform	Maximum Character Limit	N/A	Auto-on	Visible to Admins Only	Workflow administrators can enter a

		for Instructions				maximum of 500 characters for instructions in Start or Task steps in object workflow and document workflow (formerly known as multi-document workflow). In previous releases, this limit was 200 characters.
Platform		Permission Label Update: Check Out to File Manager	N/A	Auto-on	Visible to Admins Only	This feature relabels the "Check Out to File Manager" permission set level permission to "Vault File Manager". This more accurately reflects that this permission goes beyond just Check Out, allowing users to upload large rendition files using Vault File Manager, and even perform RIM Submission Archive imports.
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		User Object Custom Fields Support in Validation Rules	N/A	Auto-on	Visible to Admins Only	Custom fields on the User object can now be used in Vault validation rules for object records.
Platform		Limited Release Sandbox Feature Flag	N/A	Admin Checkbox	Visible to Admins Only	Admins can now enable the Limited Release Sandbox feature in Admin > Settings > General Settings > Sandbox. In previous releases, this feature was only available through Veeva Support.
Platform		Prompt for Object Reference Fields in Document Workflows	N/A	Configuration	Visible to Admins Only	This feature allows workflow administrators to prompt for object reference fields inside a document workflow (formerly multi-document workflow) Start step, Task step, or task verdict.
Platform		Unified Workflow Access	N/A	Configuration	Visible to Admins Only	This feature unifies access and creation of both object and document workflows under a single configuration page located at Admin > Configuration > Workflows.
Platform		Auto-Logout of Vault File Manager After Inactivity	High	Auto-on	Visible to All Users	This feature addresses security concerns and ensures users are logged out of Vault File Manager. Vault File Manager automatically logs users out after eight (8) hours of inactivity.
Platform		Group Membership Update for Inactive Users	High	Auto-on	Visible to All Users	Group memberships from included security profiles are automatically removed when a User becomes inactive. These memberships can be for groups

						that are either user-managed or system-managed.
	Platform	Inbox Enhancements	High	Auto-on	Visible to All Users	Users now require Create Document permission for the Unclassified document type in order to see the Document Inbox, or drag and drop files into it (to create new Inbox documents). Users without permission will only see the Document Inbox if they view access on a document assigned to the Inbox lifecycle. Additionally, the only documents shown in the Document Inbox are those assigned to the Inbox lifecycle.
	Platform	Release Account Lockout After 5 Minutes	High	Auto-on	Visible to All Users	In previous releases, a user account was locked out after 5 unsuccessful login attempts. Starting in this release, Vault automatically releases the lock out 5 minutes after the last unsuccessful attempt. This feature will be available with the 21R2-A release. *This feature may not be validated in pre-release vaults.
	Platform	Share My Inbox Documents	High	Auto-on	Visible to All Users	Users can configure their Document Inbox to automatically share their inbox documents with other users and groups. In addition, admins can define who a user's inbox is shared with, and can make some of these non-removable.
	Platform	Carry Forward All Document Versions	Medium	Auto-on	Visible to All Users	A document version can have document relationships to one or more versions of the same target document. If configured, Vault now carries forward all related versions when there is a new version of the source document, not just the latest version of each target document.
	Platform	Doc Info UI Enhancements	Medium	Auto-on	Visible to All Users	The Doc Info pane has now been separated into 5 panels; Information (containing doc fields), Relationships, Files, Sharing Settings, and Timeline View. The Doc Info pane can be collapsed or expanded, and users can click and drag to resize the Doc Info pane. This replaces the view switchers (mixed view vs fields view), and makes

						accessing the relevant information a lot more efficient and intuitive.
	Platform	Merge Fields Nested Table Rendering	Medium	Auto-on	Visible to All Users	This feature adds full support for nested table rendering so that when using Merge Fields for Microsoft Word repeaters in a table, only data relevant to the object record for that row is displayed in its nested tables.
	Platform	Prevent Reclassify for Checked-Out Documents	Medium	Auto-on	Visible to All Users	Vault now prevents users from reclassifying documents that are currently checked out.
	Platform	Reclassified Documents Always Retain Attachments	Medium	Auto-on	Visible to All Users	If a document has attachments, but is reclassified to a document type where attachments are disabled, the document still shows that it has attachments, but no new attachments can be added.
	Platform	Action Bar	Low	Auto-on	Visible to All Users	The Action Bar continuously learns how each user works and shows their most-used actions right on top and easily accessible with large, recognizable icon buttons. The Action Bar also helps make users more aware of workflow actions they can perform, such as starting available workflows or changing lifecycle states, by dynamically showing a workflow actions button. The Action Bar is available for object records and documents to help users perform important actions easier and faster.
	Platform	Annotate UX Refresh	Low	Auto-on	Visible to All Users	This enhancement adds a significant number of visual and usability improvements to annotations and document viewing in Vault, including simplifying the Annotate toolbar, unifying style selection, updating the Info Card design, replacing the View/Annotate icon, and replacing all the Actions menu gear with an ellipsis icon. These enhancements also apply to video annotations.
	Platform	Audit Enhancements: On Behalf of User	Low	Auto-on	Visible to All Users	With this feature, System and Application events that make data changes will be audited as "System on behalf of {username}", which provides additional information as to which user's actions

						caused the audit entry. Previously, these entries were logged only as "System". Existing audit entries will not be altered.
Platform	Bulk Actions on Objects in Reports	Low	Auto-on	Visible to All Users		Users can now perform bulk actions on object records in report results. Users can also perform bulk actions on documents when a report is grouped.
Platform	Checklists: Duplicate Checklist Prevention	Low	Auto-on	Visible to All Users		With this feature, a user can only create one checklist at a time for a given object record. This prevents users from accidentally creating a duplicate checklist while the first one is still being generated.
Platform	Consistent Report URLs Across Vaults	Low	Auto-on	Visible to All Users		This feature enables URLs for the same report to be consistent across vaults. Admins can now define web actions for accessing reports and successfully migrate them across vaults.
Platform	Contains Operator in Reports	Low	Auto-on	Visible to All Users		This feature introduces the contains operator for report filters and prompts. Users can now filter report results based on whether the defined text can be found within another text or picklist field.
Platform	Dashboard Usability Enhancements	Low	Auto-on	Visible to All Users		This feature makes several aesthetic and usability enhancements to dashboards.
Platform	Expanded Search Enhancements	Low	Auto-on	Visible to All Users		Expanded search now supports in-line editing, bulk actions, and exporting from each of the search result sections.
Platform	Hovercard on Record Picker Dialog Fields	Low	Auto-on	Visible to All Users		Users can now hover over fields on the record picker dialog, and Vault will display a hovercard with up to 1,000 characters of text.
Platform	Notifications: Enhanced Notification UI	Low	Auto-on	Visible to All Users		A new global notification icon makes it easier for Vault users to become aware of items that need their attention. In addition to introducing an icon that is visible at all times within Vault, this feature introduces a new notification panel and an enhanced notifications page.
Platform	Notifications: Support for Vault Mobile Push Notifications	Low	Auto-on	Visible to All Users		This feature enables Vault Mobile to register with Vault for users to receive mobile push notifications for new or pending workflow tasks.
Platform	Relabel the Unclassified	Low	Auto-on	Visible to All Users		In vaults created after the 21R2 release,



		Lifecycle to Inbox				the Unclassified document lifecycle is relabelled as Inbox. We recommend that customers update their existing vault configurations with the new label.
	Platform	Reports with Multiple Down Objects in Dashboards	Low	Auto-on	Visible to All Users	This feature allows users to add reports containing multiple objects with outbound references to the primary reporting object to dashboards.
	Platform	Run Report in Background	Low	Auto-on	Visible to All Users	This feature provides several enhancements for large reports. Users may now run a report in the background and receive a notification when their report results are ready. Reports run in the background can execute for longer than other reports, allowing them to handle larger volumes of data.
	Platform	Suggested Links to Permalink Targets	Low	Auto-on	Visible to All Users	This feature enables Auto Claims Linking to create Suggested Links and Auto Links to permalink targets. Users adding references to a Claim record can select Permalink as the target type, and add one or more permalink targets as references on the Claim.
	Platform	Vault File Manager Automatically Opens Files	Low	Auto-on	Visible to All Users	Prior to this release, customers could disable the ability for Vault to automatically open specific file types. With this release, all vaults now automatically open the file types specified in your Vault File Manager Security Policy records.
	Platform	Video Annotation: Claim Links	Low	Auto-on	Visible to All Users	With this release, when Suggested Links and Claim Link features are both enabled, and when a user manually creates references on video documents, the user can select approved Claims to define references. This aligns with existing capabilities on non-video documents.
	Platform	48 Hour Maximum Session Duration on All Vaults	N/A	Auto-on	Visible to All Users	With this feature, the maximum duration of a Vault session is always 48 hours, even if the session stays active. This feature was enabled in the 21R1 release except on production domains which have at least one Align Vault. This feature will be available on all Vault domains with the 21R1-A release.

Platform	Action Menu Button Icon Change	N/A	Auto-on	Visible to All Users	This feature updates all action menu buttons from a cog icon to ellipsis icon. The ellipsis icon has become a standard symbol for a menu of actions in modern web applications.
Platform	Attachments for Unclassified Documents	N/A	Auto-on	Visible to All Users	Documents of the type Unclassified (previously Undefined) now include the Attachments section in the Doc Info pane. Admins can also disable attachments on unclassified documents.
Platform	Create Related Record in Record Create Dialog	N/A	Auto-on	Visible to All Users	In previous releases, users that wished to create a new record within a related record first had to create a new record if it did not already exist. Users can now create a related record directly in the create record dialog.
Platform	Disable Office Online on All Vaults	N/A	Auto-on	Visible to All Users	In 21R2, users will no longer be able to check out to Office Online. The preferred technology moving forward is Edit in Office 365 (collaborative authoring). Users can still check in and undo checkout until 21R3, when all Office Online capabilities will be disabled.
Platform	Document Inbox Auto-On for All Vaults	N/A	Auto-on	Visible to All Users	This feature enables the Document Inbox on all vaults. Additional features introduce ways to control who has access to its abilities, including a way to control exactly which users can create unclassified documents or see the Classify later option when uploading a new document.
Platform	Document Workflow on Binders	N/A	Auto-on	Visible to All Users	This feature allows users to start a document workflow (formerly multi-document workflow) on binders. Users can start the workflow on a binder itself or on a set of documents that contain binders.
Platform	Enable Document Tags on All Vaults	N/A	Auto-on	Visible to All Users	This feature enables document tags on all Vaults. Any customers who did not previously have the feature enabled will see a new "Document Tags" item under Document Setup in Admin, as well as the tag__v picklist field on documents.
Platform	Infinite Document Scrolling	N/A	Auto-on	Visible to All Users	This enhancement eliminates visible tranche navigation on long documents,

						allowing users to scroll and paginate seamlessly across all pages.
Platform	Install Vault File Manager Without Affecting Checked-Out Files	N/A	Auto-on	Visible to All Users		With this release, updating Vault File Manager automatically or manually via reinstalling Setup.exe on a machine where Vault File Manager is already installed does not affect previously checked out files.
Platform	Localize Vault to Swedish	N/A	Auto-on	Visible to All Users		The Vault UI now supports Swedish.
Platform	Navigate From Collapsible Upload Modal to Inbox	N/A	Auto-on	Visible to All Users		With this feature, users can navigate back to the Document Inbox from anywhere in Vault via a new button on the collapsible document upload status dialog.
Platform	Relabel the Undefined Document Type to Unclassified	N/A	Auto-on	Visible to All Users		In vaults created after the 21R2 release, the Undefined document type is relabelled as Unclassified. We recommend that customers update their existing vault configurations with the new label.
Platform	Rename Start Multi-Document Workflow to Start Document Workflow	N/A	Auto-on	Visible to All Users		This feature renames the "Start Multi-document Workflow" action to "Start Document Workflow".
Platform	Renditions for RTF Files	N/A	Auto-on	Visible to All Users		With this release, Vault supports auto-generating viewable renditions for RTF (Rich Text Format) files.
Platform	Task Due Date Audit Updates in Document Audit Trail	N/A	Auto-on	Visible to All Users		This feature adds useful information to the Due Date audit event for object workflows and document workflows (formerly multi-document workflows). Update due date actions taken by users are captured correctly and the due date update is shown once per task.
Platform	UI Styling Updates	N/A	Auto-on	Visible to All Users		The Vault user interface has been updated to provide a better visual experience. The updates include changes to color, spacing, highlighting, and some icons. These updates do not affect any application functionality.
Platform	Infrastructure Release: IP Address Change	N/A	Auto-on	None		Vault IP addresses will change as part of this release.
Platform	Standard Reports	N/A	N/A	None		This feature allows Vault applications to introduce standard reports that cannot be deleted and only allow edits in a limited

						capacity, if at all. Note that while this feature introduces the ability for Vault applications to add standard reports, this release does not include any new standard reports in customer vaults.
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Change Log

This feature list is subject to change prior to the 21R2 release. We will begin tracking changes on June 21st, 2021.

Date	Change	Impact
25 Jun 2021	<p>Added the "Group Membership Update for Inactive Users" feature.</p> <p>Updated the GxP Risk of the following features: - "Batch Release Process Support" from "High" to "Low"</p> <p>Updated the Enablement of the following features: - "Extensible SiteVault Permissions" from "Configuration" to "Support" - "Content Field for Inbox Documents" from "Configuration" to "Auto-on"</p> <p>Updated the Feature Description of the following features: - "Extensible SiteVault Permissions" feature description appended with "*This feature is not available in pre-release vaults." - "Content Field for Inbox Documents" feature description appended with "This feature is auto-on for customers with the Content (blinding__v) field on the Base Document Type."</p>	<p>The RIA now includes a list of all features in 21R2 and up to date GxP Risks, Enablements, and Feature Descriptions.</p>
22 Jun 2021	<p>Removed the "Products in Agreement Wizard" feature.</p> <p>Updated the GxP Risk of the following features: - "Enablement Change: Extensible Controlled Copy" from "High" to "N/A" - "Language Field Alignment" from "Low" to "N/A"</p> <p>Updated the Default Impact of the following features: - "Reclassified Documents Always Retain Attachments" from "None" to "Visible to All Users" - "Merge Fields Nested Table Rendering" from "None" to "Visible to All Users"</p>	<p>The RIA now includes a list of all features in 21R2 and up to date GxP Risks and Default Impacts.</p>
18 Jun 2021	Second RIA Version Published	The RIA now includes up to date information about features in 21R2.
14 Jun 2021	Initial RIA Published	N/A