

Veeva Vault Vault 20R1 Release Impact Assessment

The Release Impact Assessment (RIA) documents the new capabilities introduced in Vault in 20R1 that may affect a customer's vault. We release a version of the RIA in advance of the general release. On March 24th, the Validation Impact Assessment, which contains validation information for new features in 20R1, will be available in your VeevaDocs vault. Refer to the Enablement and Default Impact for each feature to determine the visibility and configuration requirements. On March 16th, the [20R1 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: 31 Mar 2020

This feature list is subject to change prior to the 20R1 release. We will begin tracking changes on March 2nd, 2020.

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| Feature: | Name of the feature introduced in 20R1 |
| 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 |
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| | CTMS | Vault EDC/CTMS Connection with Spark | Medium | Configuration | Visible to Admins Only | This feature allows customers using both Vault EDC and Vault CTMS applications to connect those vaults for the purpose of transferring Studies, Study Countries, and Sites from Vault CTMS to Vault EDC and Subjects, Subject Visits, and Visit Definitions from Vault EDC to Vault CTMS using the Vault Spark Messaging framework. *This feature is not validated in pre-release vaults. |
| | CTMS | Yuzu: Japanese Clinical Trial Notification Generation | Medium | Support | None | This feature allows users to generate and manage Japanese CTN on Vault CTMS. *This feature is only available to Early Adopters. |
| | CTMS, eTMF, Study Startup, Vault Payments | Streamlined Reuse for Product/Person/Org Documents | Medium | Configuration | Visible to Admins Only | This feature allows Admins to identify which of their document types are frequently reused, and maintains the Study, Study Country, and Study Site fields for those document types as Persons, Organizations, or Products are added to and removed from studies. |
| | CTMS, Study Startup, Vault Payments, eTMF | Study Team Role Field Enhancements | High | Auto-on | Visible to All Users | This feature allows certain Study Team Role record fields (Name, Description, Monitoring Visit Participant, and Link) to be edited even if the Study Team Role record is referenced by a User Role Setup record. |
| | CTMS, eTMF, Study Startup, Vault Payments | Clinical Operations Configuration for Object References in Advanced Search | N/A | Auto-on | Visible to All Users | The Object References in Advanced Search feature enables Admins to add object reference fields as filters in the Advanced Search dialog for documents. By default, Clinical Operations vaults include the Study, Study Country, and Site object reference fields as filters in the Advanced Search dialog. |
| | CTMS, Study Startup, Vault Payments, eTMF | Clinical Operations Data Model Changes | N/A | Auto-on | Visible to All Users | With every release, we update the data model to better support evolving needs and new feature functionality. |
| | CTMS, eTMF, Study Startup, Vault Payments | Delay & Batch Autocomplete Job | N/A | Auto-on | Visible to All Users | Vault now calculates completeness metrics and autocomplete after a five- |



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| | | | | | | minute delay to ensure accurate completeness calculations for milestones. |
| | Vault Payments | Fee Schedule Date Effectivity | Medium | Auto-on | Visible to All Users | This feature adds support for multiple approved fee schedules, each with a specified effective date range. Vault Payments will generate payable items based on the fee schedule in effect when the activity occurred. |
| | Vault Payments | Multi-Status Fees | Medium | Auto-on | Visible to All Users | This change updates Fee Definitions to allow for multiple statuses in the underlying Payable Event, and the evaluation criteria now support more than one valid status. A fee will generate one payable item or the corresponding set for Payee Overrides per Payable Event, regardless of the number of statuses. |
| | eTMF | eTMF to Submissions Connection | Medium | Configuration | Visible to Admins Only | This feature leverages the Vault Spark Messaging framework to connect eTMF vaults to RIM Submissions vaults, streamlining the transfer of products, studies, study sites, and documents between vaults. *This feature is not validated in pre-release vaults. |
| | eTMF | Agreement Wizard | N/A | Auto-on | Visible to All Users | The Agreement Wizard is a new interface that streamlines and improves the process of accepting a Clinical Network Agreement by making the associated changes clearer and more readable. |
| SiteVault | Application | Feature Name | GxP Risk | Enablement | Default Impact | Description |
| | SiteVault Enterprise, SiteVault Free | SiteVault Family Data Model Changes | N/A | Auto-on | Visible to All Users | This feature adds an "Investigator?" field to the Person object as an alternative to using the existing Person object types. |
| Commercial | Application | Feature Name | GxP Risk | Enablement | Default Impact | Description |
| | MedComms | Enhanced Medical Inquiry Email Capabilities | Medium | Admin Checkbox | Visible to Admins Only | This feature enhances Medical Inquiry's email capabilities by logging and tracking sent emails, including notifying the sender if and why an email could not be delivered. Additionally, emails now include a Reply-to, allowing recipients to easily respond to the MedComms user who sent the email. |

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| MedComms | Enhanced Configurability of Standard Fields on Select Medical Inquiry Standard Objects | Low | Auto-on | Visible to Admins Only | Admins can specify whether the following fields are mandatory: Case Priority, Origination Channel, Request Category, Preferred Response Method, Case Contact, National Provider Identifier (NPI), and Specialty. |
| MedComms | MedComms 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. |
| MedComms, Multichannel, PromoMats | New Shared Field for CLM iOS Native Resolution | Low | Configuration | Visible to Admins Only | This feature adds a new shared picklist field, iOS Resolution, to the Multichannel Slide document type to support CRM Native Resolution. |
| MedComms, PromoMats | Open Portal Experience from Vault | Low | Admin Checkbox | Visible to Admins Only | With this feature, users can open the full Portal in the current browser tab. In addition, users with the correct permissions can edit the Portal directly from the Portal Selector drop-down on the Portal Homepage. |
| Multichannel | Update BEE Editor Support | N/A | N/A | Visible to All Users | Users will no longer be able to delete folders if they contain files or other folders. Internet Explorer users will no longer be able to use the BEE email template editor to edit email templates in Vault. *This feature may not be validated in pre-release vaults. |
| PromoMats | Auto Claims Linking: Hierarchical Copy on Claims | Low | Auto-on | Visible to All Users | When making a copy of Claim records, users can now choose to also copy the References and Match Text Variations. |
| PromoMats | Auto Claims Linking: Match Text Variations | Low | Auto-on | Visible to All Users | This feature allows users to add multiple approved match text variations to each Claim record and enables the Auto Claims Linking feature to find and link each variation to the defined set of references on the Approved Claim. |
| PromoMats | Auto Claims Linking: Prevent Move & Edit References on Approved Links | Low | Auto-on | Visible to All Users | Once a Suggested Link is accepted, users cannot Move or Add / Remove references on the resulting Link Annotation. The associated Move and Link buttons do not appear in the Annotation toolbar. |
| PromoMats | Auto Claims Linking: Remove Suggested Links | Low | Auto-on | Visible to All Users | This feature allows users to perform the Remove Suggested Links action, which |

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| | | | | | | removes all Suggested Link annotations on the document. |
| PromoMats | Auto Claims Linking: Suggested Links Document Field | Low | Auto-on | Visible to All Users | | This feature introduces the Suggested Links (annotations_suggested__v) document field to PromoMats vaults with Automated Claims Linking enabled. This field contains the count of pending Suggested Link annotations. Once a user accepts, rejects, or removes a suggested link, that link is no longer included in the count. |
| PromoMats | Auto Claims Linking: Where Used Component | Low | Auto-on | Visible to All Users | | Users can now see a list of all document versions where suggested links have been generated for a given Claim from its record detail page. |
| PromoMats | Auto Claims Linking: Wildcards in Match Text | Low | Auto-on | Visible to All Users | | Users can now include "wildcards," formatted as {*}, in a claim's match text string. Wildcards enable matching when variable words and characters exist. |
| PromoMats | Enablement Change: Standard Metrics (Non-Mandatory) | Low | Auto-on | Visible to All Users | | The PromoMats Standard Metrics feature (introduced in 19R3) tracks key content review and cost information. In 19R3 this feature was optional. In 20R1, it will be automatically enabled for all vaults. The Global Content Type, Content Creation Currency, Content Creation Cost fields will be non-mandatory on all documents. On release night an asynchronous job will set these fields to "Not Specified" for all existing documents where the fields are blank. These field updates will not be in the audit trail. *Recent change to make fields non-mandatory is not in pre-release vaults. |
| PromoMats | Auto Claims Linking: Make Dependent on Link Annotation Enablement | N/A | Auto-on | Visible to All Users | | When "Allow creation of link annotations" is disabled in Admin > Settings, Vault hides the Suggest Link button on the Doc Info page, hides any existing Suggested Links, and does not display either Suggested Link options in Admin > Configuration > Document Types. |
| PromoMats | PromoMats 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. |

| Quality | Application | Feature Name | GxP Risk | Enablement | Default Impact | Description |
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| | Training, Station Manager, QualityDocs, QMS | 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-Recall Controlled Copies | High | Configuration | Visible to Admins Only | Customers using Extensible Controlled Copy can configure their vaults to find all associated controlled copies when a document version is superseded or obsolesced, change their lifecycle states, and configure auto-start workflows to initiate a reconciliation process. |
| | QualityDocs | Display Mandatory Participants in Workflow Start Dialog | High | Auto-on | Visible to All Users | The initiator of a Document Change Control (DCC) workflow that includes Mandatory Participants is able to see which groups and users will receive mandatory review/approval tasks in the Start dialog before the workflow is initiated. |
| | Station Manager | Station Manager: Document Categorization | Medium | Configuration | Visible to Admins Only | This feature allows for the categorization of documents assigned to a Station. Categories are defined and managed in Vault and applied on the mobile application, so operators can pick a category and only browse the documents relevant to their current task. *This feature supports future versions of the Station Manager mobile applications. |
| | Station Manager | Station Manager: Additional Fields on Station Device | Low | Auto-on | Visible to All Users | Station Device records now include three new fields to give Business and IT Admins additional information for their tablets running Station Manager. *Admins must add new fields to the Station Device object page layout. **This feature supports future versions of the Station Manager mobile applications. |
| | Training | External Training Type | High | Configuration | Visible to Admins Only | A new training type allows Learners to complete training on content or topics that occur outside of Vault. |
| | Training | Complete Training Assignment Workflow Visible in Admin | Medium | Auto-on | Visible to Admins Only | The Complete Training Assignment workflow is now visible in Admin. This allows Admins to configure Notifications and Task Reminders for the workflow. |

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| | Training | Direct Assignment to Curriculum | Medium | Configuration | Visible to Admins Only | Direct Assignment now supports issuing a Direct Assignment Training Assignment for a Curriculum. |
| | Training | Manager Access to Training Records | Medium | Configuration | Visible to Admins Only | This feature adds the ability for a Learner's manager to have visibility into Learners' Training Assignment records. |
| | Training | Direct Assignment to Multiple Learners | Medium | Auto-on | Visible to All Users | Direct Assignment now supports issuing a Direct Assignment Training Assignment to multiple Learners within a single request. *Auto-on in vaults with the Direct Assignment feature enabled. |
| | Training | Improvements to Learner Task Page | Medium | Auto-on | Visible to All Users | This feature enhances the Learner Task Page UI, adding checkmarks for viewed documents, a default landing page, a Learner Task Page presentation for completed Training Assignments, and minor cosmetic improvements. |
| | Training | Training Requirement Object Type Limitation | Medium | Auto-on | Visible to All Users | This feature prohibits changing a Training Requirement record's object type after saving the record. |
| | Training | Training Requirement ZIP File Limitation | Medium | Auto-on | Visible to All Users | Users cannot add ZIP files to Training Requirement records. |
| | Training | Person Object: Remove User Restrictions When Adding a Learner Role | N/A | Auto-on | Visible to All Users | When adding a Learner Role to a Person record, an active User reference is only required if Training Eligibility is set to Eligible. *Auto-on in vaults utilizing the Use Training Eligibility setting. |
| Regulatory | Application | Feature Name | GxP Risk | Enablement | Default Impact | Description |
| | RIM Publishing | Australia eCTD XSD 3.1 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 AU TGA v3.1 (XSD 3.1) specification. Vault validates these submissions based on the corresponding AU TGA v3.1 Validation Criteria. *This feature is not validated in pre-release vaults. |
| | RIM Publishing | Switzerland eCTD DTD 1.4 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 v1.4 (DTD 1.4) specification. Vault validates these |

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| | | | | | | submissions based on the corresponding CH Swissmedic v1.4 Validation Criteria. |
| RIM Publishing, RIM Registrations, RIM Submissions, RIM Submissions Archive | RIM Data Model Updates for 20R1 | N/A | Auto-on | Visible to Admins Only | | This feature adds new objects, fields, picklist values, and more in RIM vaults. *Admins must perform additional configuration to make changes available to end users. |
| RIM Publishing, RIM Registrations, RIM Submissions, RIM Submissions Archive | Enablement Change: Allow Multi-Select on Standard Document Fields | N/A | Configuration | Visible to Admins Only | | With this release, Admins can configure certain standard document fields to be multi-select without contacting Veeva Support to enable the feature. |
| RIM Publishing, RIM Submissions | Publish CrossLinks | Medium | Auto-on | Visible to All Users | | Vault now publishes CrossLink documents matched to content plan items as part of the submissions publishing and report level publishing processes. *Auto-on in vaults with CrossLinks enabled. |
| RIM Publishing, RIM Submissions | Content Plan Hierarchy Viewer: Tree Grid | Medium | Support | None | | The new Content Plan Hierarchy Grid Viewer displays content plans, content plan items, and matched documents in a hierarchical structure within the grid. Users can filter on some columns in the grid and perform actions on matched documents, including matching documents by dragging and dropping documents from the Library or Cart onto a content plan item. |
| RIM Registrations | XEVMPD Bulk Updates | Medium | Configuration | Visible to Admins Only | | This feature allows users to select impacted medicinal products, re-generate the product report structures, and submit updated XMLs to the EMA in bulk. |
| RIM Registrations | Enhancements to Create Related Records Wizard | Medium | Auto-on | Visible to All Users | | This feature updates the bulk creation process for activities, submissions, and regulatory objectives to improve the user experience and to better support the management of medical device-related change events in addition to drug-related change events. |
| RIM Registrations | Manage Registered Details Updates | Medium | Auto-on | Visible to All Users | | This feature updates the Manage Registered Details wizard to display all records impacted by a change instead of aggregated data, allow updates to fields on the Registration records, and capture enhanced audit trail information. |
| RIM Submissions | Submissions to eTMF | Medium | Configuration | Visible to Admins Only | | This feature leverages the Vault Spark |

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| | | Connection | | | | Messaging framework to connect RIM Submissions vaults to eTMF vaults, streamlining the transfer of products, studies, study sites, and documents between vaults. *This feature is not validated in pre-release vaults. |
| | RIM Submissions | Start Multi-Document Workflow from Content Plan Viewer | Medium | Auto-on | Visible to All Users | Users can send up to 100 matched documents on a multi-document workflow directly from the Content Plan Hierarchy Viewer. *Auto-on in vaults with an active multi-document workflow configured. |
| Mobile | Application | Feature Name | GxP Risk | Enablement | Default Impact | Description |
| | Station Manager | Document Categorization | Low | Auto-on | Visible to All Users | This feature allows for the categorization of documents assigned to a Station. Categories are defined and managed in Vault and applied on the mobile application, so operators can pick a category and only browse the documents relevant to their current task. *Auto-on for devices whose Station is configured to show categories. |
| | Station Manager | Enforced Document & Size Maximums | N/A | Auto-on | Visible to All Users | The Station Manager mobile applications now enforce 1,000 documents per Station, 10GB total rendition size, 500MB per video rendition (iOS only), and 100MB per PDF rendition. |
| | Station Manager | Improved Document Search Performance on Android | N/A | Auto-on | Visible to All Users | This feature updates Android Station Manager to support faster searching within viewable document renditions. This enables end-users to quickly search for keywords within procedures and instructions and increase efficiency on the shop floor. |
| Platform | Application | Feature Name | GxP Risk | Enablement | Default Impact | Description |
| | Platform | New Domain Admin UI | High | Auto-on | Visible to Admins Only | This feature, along with the User Object Admin Page feature, updates user management from Admin > Users & Groups. The updated Domain Users page allows Domain Admins to perform domain-specific tasks. |
| | Platform | Configurable CrossLink | High | Admin | Visible to Admins Only | Admins can use two (2) new checkboxes |



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| | | Renditions | | Checkbox | | on the Admin > Settings page to control whether Vault includes the overlays or signature pages applied to source documents when users create CrossLink documents. |
| Platform | | Manager Groups | High | Configuration | Visible to Admins Only | Vault creates one system-managed group for each user in the vault, with each group containing the user's direct manager. Vault maintains manager group memberships based on the Manager field on the User object records. |
| Platform | | New Functions and state__v Support | Medium | Auto-on | Visible to Admins Only | This feature (1) introduces new functions: Power(), Sum(), Average(), and StartOfDay() to Vault Formulas (2) enhances Today() to take an optional timezone parameter (3) adds support for accessing the name of a lifecycle state instead of only being able to access the state's label. |
| Platform | | Record Migration Mode for Configuration Migration Packages | Medium | Auto-on | Visible to Admins Only | Record Migration Mode allows Admins to use outbound packages with dataset items to create object records in non-Initial states. |
| Platform | | Test Data Packages | Medium | Auto-on | Visible to Admins Only | This feature introduces a new type of Outbound Package called "Test Data". Admins can leverage this type of package to export and load object records between vaults. |
| Platform | | Additional Deletion Rule for Document Reference Fields | Medium | Configuration | Visible to Admins Only | Admins can now configure the "Set field to blank when related document is deleted" deletion rule for document reference fields on objects. If a user tries to delete the document when this deletion rule is configured, Vault does not block document deletion and instead sets the document reference field to Null. |
| Platform | | Advanced Criteria for Entry Actions on Related Records | Medium | Configuration | Visible to Admins Only | This feature provides Admins with additional filtering criteria for object lifecycle state entry actions that execute changes for related object records. |
| Platform | | Aggregate Checklist Designs | Medium | Configuration | Visible to Admins Only | This feature allows Admins to aggregate content from two or more checklist designs. |
| Platform | | Asynchronous Task | Medium | Configuration | Visible to Admins Only | Admins can now configure an object |

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| | | Processing | | | | workflow task to complete asynchronously. This change allows users to complete individual tasks without affecting other workflow tasks or processes. |
| Platform | | Attach Multiple Documents in Checklist Responses | Medium | Configuration | Visible to Admins Only | This feature allows Admins to configure questions to allow multiple document references so that users can select one or more documents when responding to a checklist. |
| Platform | | Checklist Design Versioning | Medium | Configuration | Visible to Admins Only | This feature allows Admins to manage checklist design versions. |
| Platform | | Enable Checklists Feature in All Vaults | Medium | Configuration | Visible to Admins Only | This feature extends checklist functionality, allowing Admins to enable checklists for any Vault application. |
| Platform | | Entry Criteria: Content Must Not Be Checked Out | Medium | Configuration | Visible to Admins Only | A new document lifecycle state entry criteria ensures that the document is not checked out upon entering a state. |
| Platform | | Multi-Document Workflow: Single Verdict for All Content Documents | Medium | Configuration | Visible to Admins Only | Multi-document workflows now support workflow tasks that prompt for a single verdict, which is applied to all content documents. Previously, Vault prompted for verdicts for each content document. |
| Platform | | Optional Tasks for Object & Multi-Document Workflows | Medium | Configuration | Visible to Admins Only | Multi-document workflows and object workflows now support optional tasks. When starting a workflow, the workflow initiator can determine whether or not to include the task in the workflow instance. |
| Platform | | Document Type Support for Reference Lookups | Low | Auto-on | Visible to Admins Only | This feature supports developers building Spark Messaging integrations by enhancing Integration Rule Reference Lookups to have Document Type support. |
| Platform | | Unmodified Source Rendition Type for Modified Vault Documents | Low | Auto-on | Visible to Admins Only | Vault Owners can download the unmodified source files that are stored when Vault makes changes to the source document through features such as Merge Fields, RIM Dynamic Linking, and Create ToC for Content Plan Items. |
| Platform | | Vault ID Filter for Login Audit History | Low | Auto-on | Visible to Admins Only | This feature introduces the ability to filter by Vault ID in the Login Audit History, allowing Admins to more quickly understand the number of successful user logins over a period of time. |

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| Platform | Enable External Users to Bring Forward Anchor Annotations | Low | Configuration | Visible to Admins Only | When granted the Annotate and Manage Anchors permissions, users with the External User license type can now bring forward anchor annotations from a previous version of a document to the latest version. |
| Platform | Multi-Pass Reporting: Ladder Scenario | Low | Configuration | Visible to Admins Only | Admins can now create multi-pass reports that support more complex data models such as objects with multiple in-bound relationships. Users can also join reports on dates and leverage the new date report type. |
| Platform | Object References in Advanced Search | Low | Configuration | Visible to Admins Only | Admins can configure up to five (5) object reference fields to be included as filters in the Advanced Search dialog for documents. |
| Platform | Run Job on Latest Steady State Version | Low | Configuration | Visible to Admins Only | This feature enables date-based document jobs to run on the latest Steady state version of a document, even if it is not the absolute latest version. |
| Platform | Deletion Rule Label Updates | N/A | Auto-on | Visible to Admins Only | This feature updates the labels of Deletion Rule drop-down options for both document reference fields and object reference fields. |
| Platform | Expand Time Period for Login Audit Logs | N/A | Auto-on | Visible to Admins Only | Admins can now view and export data from the Login Audit Trail without time restrictions. |
| Platform | Spark Message Delivery Event Handler | N/A | Auto-on | Visible to Admins Only | This new SDK interface allows applications and customers to handle delivery failures of Spark messages. *Auto-on for Outbound Queues implementing MessageDeliveryEventHandler in their Spark Messaging integration. |
| Platform | Formatted Output: List of Attachments | N/A | Configuration | Visible to Admins Only | Formatted Output users can now include a list of attached files from the targeted record. |
| Platform | Lookup Field on Lifecycle State | N/A | Configuration | Visible to Admins Only | Vault Admins can now create Lookup-type fields on objects that reference Lifecycle (lifecycle__v) and Lifecycle State (state__v) fields to allow users to view the states of related records. |
| Platform | Record Workflow Action | N/A | Configuration | Visible to Admins Only | Record workflow actions allow SDK |



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| | | Enhancement: Display Custom Participant Group on Object Workflow Start Dialog | | | | developers to control whether or not a custom participant group is displayed on the workflow start dialog. |
| | Platform | Single Create Button Across All Tabs | High | Auto-on | Visible to All Users | Vault now supports a single global Create button across all Object, Document, Report and other tabs. This feature: removes the inline Create button on tabs; makes the Create button contextual based on a user's location in Vault; consolidates document creation options in the menu; adds a drop-down to the Create button with additional creation options, including Recent options; and limits visibility or usability of the Create button based on user permissions. |
| | Platform | User Name & Password Retrieval During Login | High | Auto-on | Visible to All Users | This feature merges the credential recovery process into a single "Having trouble logging in?" flow. Users now enter their email address to get their user name or to reset their password for any accessible vault. *This feature may not be validated in pre-release vaults. |
| | Platform | User Object Admin Page | High | Auto-on | Visible to All Users | Admins can now fully manage Vault users with the User object. This feature: adds User object page layout sections for groups, delegate access, security overrides, and Veeva Support access; adds actions to reset password, resend welcome email, and create cross-domain users; and updates permission sets for new user management options. |
| | Platform | Collaborative Authoring with Microsoft Office Usability Enhancements | Medium | Auto-on | Visible to All Users | This feature introduces enhancements to the Collaborative Authoring with Microsoft Office user experience in Vault. *Auto-on in vaults with Collaborative Authoring enabled. |
| | Platform | Enhanced Checklist Workflow Task Completion | Medium | Auto-on | Visible to All Users | Vault now supports previously-defined checklist workflow task prompt configuration, providing a user experience for checklist completion that is consistent with task completion. |
| | Platform | Multi-Document Workflow: Add Participant | Medium | Auto-on | Visible to All Users | Multi-document workflows now support |

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| | | | | | | the ability to add participants after the workflow has already started. |
| Platform | Collaborative Authoring with Microsoft Office: PowerPoint & Excel Support | Low | Auto-on | Visible to All Users | | Collaborative Authoring with Microsoft Office now supports checking out and editing Microsoft PowerPoint and Microsoft Excel files. |
| Platform | Create From Template in a Record's Related Document Section | Low | Auto-on | Visible to All Users | | In an object record's related documents section, users can now add new documents using a Create from Template option. |
| Platform | Define PDF Export Option in Reports | Low | Auto-on | Visible to All Users | | This feature allows users to define whether a report's columns should always fit on a single page when exporting to PDF on a report-by-report basis. By default, the option to fit to page is selected, but users can easily update it when editing the report. |
| Platform | Document Archive Changes: Merge Fields, CrossLinks, and Archive Date Field | Low | Auto-on | Visible to All Users | | When archiving a document with Merge Fields, Vault automatically sets the "Merge Fields" document field value from Yes to No. When archiving a CrossLink document, Vault automatically sets the version binding to be version-specific to retrieve the current latest version of the source document. Vault also automatically populates a new Archive Date field when archiving a document. * Auto-on in vaults with Document Archiving enabled. |
| Platform | Dynamic Tabs | Low | Auto-on | Visible to All Users | | Clicking Show in Tab on a list of related object records now show the list of related records in a dynamically-generated tab. All related record lists now have a Show in Tab link, including related lists for objects that don't have a custom tab configured. |
| Platform | Excel Templates for Reports | Low | Auto-on | Visible to All Users | | This feature allows customers to upload Microsoft Excel templates to Vault and export report data into those templates. |
| Platform | Footnote & Endnote Linking in PDF Renditions of MS Word Files | Low | Auto-on | Visible to All Users | | Vault creates links within the Viewable Rendition for endnotes and footnotes in Microsoft Word source files. |
| Platform | Navigate External Bookmarks | Low | Auto-on | Visible to All Users | | In Doc Info Bookmarks, users can view and navigate bookmarks that target |

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| | | | | | | external URLs. When a user clicks a bookmark, the target opens in new tab or browser window. |
| | Platform | Navigation Panel Update | Low | Auto-on | Visible to All Users | The navigation panel with section links on the object record detail page and the Sharing Settings page now appear on the left side of the screen instead of on the right side to enhance the navigation experience. Clicking on a section link will take users to that section and expand it. |
| | Platform | Prevent Merge Fields in Steady State | Low | Auto-on | Visible to All Users | This feature disables the automatic merging of document fields when the document is in the Steady state. |
| | Platform | Prevent Null Checkboxes | Low | Auto-on | Visible to All Users | Previously, checkbox fields defaulted to null/blank when users created new records. Now, when users create new records and don't provide values in checkbox fields, those fields default to No. Checkboxes will no longer support a null value on any record. *Auto-on for all new checkbox fields or all new records with checkbox fields. |
| | Platform | Task Verdict Comment in Reports | Low | Auto-on | Visible to All Users | This feature adds support for the "Task Verdict Comment" field in Workflow with Object reports. Previously, Admins could configure object workflows to include Task Verdict Comments, but these comments were not accessible within reports. |
| | Platform | Update Flow for Upload Document in a Record's Related Document Section | Low | Auto-on | Visible to All Users | In an object record's related documents section, when users click on Upload, Vault now directs them to the main Upload Files page for documents instead of an upload pop-up dialog. |
| | Platform | Updated Record Picker Dialog | Low | Auto-on | Visible to All Users | This feature updates the dialog for selecting object records to replace the plus and minus buttons. Users now select a single record using radio buttons and multiple records using checkboxes. Users must close the dialog manually when selecting a single record. |
| | Platform | Constrain Filter Value Lookups by Search Results | N/A | Auto-on | Visible to All Users | With this feature, Vault constrains object reference field values in filter value searches on document tabs. These filters |

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| | | | | | | now only return values that are included in a user's search results. |
| Platform | Eliminate Separation on Mid-Word Changes to Font Face, Size & Style | N/A | Auto-on | Visible to All Users | | Vault has made several minor improvements to document text indexing in order to positively impact the efficacy of several features. |
| Platform | Exclude Inactive Picklist Values from Filter Lookups | N/A | Auto-on | Visible to All Users | | When users look up picklist values within search filters, Vault now excludes inactive values if there are no documents using those picklist values. |
| Platform | Multi-Document Workflow: Add Participants, Reassign Tasks & Start Workflow Respect Constraints | N/A | Auto-on | Visible to All Users | | This multi-document workflow enhancement filters the participant picklist based on the constrained role. Previously, Vault would show an error when a user selected a participant who was not in the allowed role. Now, users cannot select those participants. |
| Platform | New OCR Limits | N/A | Auto-on | Visible to All Users | | This feature improves usability and supportability of the OCR (Optical Character Recognition) rendering feature by clearly defining maximum default limits for documents to be processed for OCR. |
| Platform | New Tab-based UI for Vault File Manager | N/A | Auto-on | Visible to All Users | | This release introduces a new tab-based user interface for Vault File Manager, which will allow for new functionality to be added in tabs in future releases. |
| Platform | Platform 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. |
| Platform | Removing Validation that Prevents State Changes in Multi-Document Workflows When a Document is Checked Out | N/A | Auto-on | Visible to All Users | | Prior to this release, Vault prevented state changes in a multi-document workflow if a document was checked out. In this release, we've removed this limitation to support the new "Content is not checked out" document lifecycle state entry criteria, which allows Admins to decide when to prevent or allow state changes. |
| Platform | System Owned User Field | N/A | Auto-on | Visible to All Users | | This feature adds a new read-only Yes/No field called System Owned User (system_owned_user__sys) to the User object and sets it to Yes for the System and Application Owner users. |
| Platform | Truncate Long URLs on | N/A | Auto-on | Visible to All Users | | On Internet Explorer browsers, Vault now |

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| | | Internet Explorer | | | | shortens URLs that contain more than 2,000 characters. This can occur when users search for documents or object records while using many filters or displaying many columns. |
| | Platform | Updated Document Picker Dialog | N/A | Auto-on | Visible to All Users | When managing document relationships on documents, or selecting documents in document reference fields on object records, an updated user interface in the dialog better distinguishes between single- and multi-select. Users now select a single document using radio buttons and multiple documents using checkboxes. |
| | Platform | Vault File Manager Access without API Permissions | N/A | Auto-on | Visible to All Users | When logging in to Vault File Manager, users no longer need the API Access permission in their permission sets. |
| | Platform | Localize Vault to Dutch | N/A | Support | Visible to All Users | Users can now update the language Vault displays for them to Dutch by changing the language settings on the User Profile page. *Users can automatically select Dutch in the drop-down, but Vault won't localize to Dutch unless enabled by Veeva Support. |
| | Platform | Merge Fields Sorting | Low | Auto-on | None | This feature introduces the ability to order the values being merged to a Microsoft Word™ document using an ORDER BY clause on the mapped token. |
| | Platform | Include KeyInfo in SAML Requests | N/A | Support | None | SAML Requests will now include a KeyInfo attribute in all domains provisioned as of the 20R1 release. Customers with existing vaults can contact Veeva Support to request this feature. *This feature may not be validated in pre-release vaults. |

Change Log

This feature list is subject to change prior to the 20R1 release. We will begin tracking changes on March 2nd, 2020.

| Date | Change | Impact |
|-------------|---|---|
| 31 Mar 2020 | <p>Updated the GxP Risk of "Expand Time Period for Login Audit Logs" from "Medium" to "N/A".</p> <p>Updated the Description of "Exclude Inactive Picklist Values from Filter Lookups" to better reflect the feature's functionality.</p> | The RIA now includes up to date GxP Risks and Descriptions. |
| 20 Mar 2020 | <p>Renamed "Standard Metrics (Make Mandatory)" to "Enablement Change: Standard Metrics (Non-Mandatory)" and updated the Description to better reflect the feature's functionality.</p> <p>Removed the "This feature may not be validated in pre-release vaults." note from the Descriptions of following features:</p> <ul style="list-style-type: none"> - "eTMF to Submissions Connection" - "Vault EDC/CTMS Connection with Spark" - "Agreement Wizard" - "Enhanced Medical Inquiry Email Capabilities" - "Auto Claims Linking: Where Used Component" - "Enablement Change: Standard Metrics (Non-Mandatory)" - "Manager Access to Training Records" - "Training Requirement ZIP File Limitation" - "Submissions to eTMF Connection" - "XEVMPS Bulk Updates" - "Australia eCTD XSD 3.1 Publishing & Validation" - "Manage Registered Details Updates" - "Content Plan Hierarchy Viewer: Tree Grid" - "Truncate Long URLs on Internet Explorer" - "Localize Vault to Dutch" - "New OCR Limits" - "Multi-Document Workflow: Add Participants, Reassign Tasks & Start Workflow Respect Constraints" - "Collaborative Authoring with Microsoft Office Usability Enhancements" - "System Owned User Field" - "Deletion Rule Label Updates" - "Multi-Pass Reporting: Ladder Scenario" - "Manager Groups" | The RIA now includes up to date Feature Names and Descriptions. |
| 17 Mar 2020 | Added a link to the 20R1 release notes. | The RIA now includes a link to the 20R1 release notes. |



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| 13 Mar 2020 | Updated the Description of "Update BEE Editor Support" to better reflect the feature's functionality. | The RIA now includes up to date Descriptions. |
| 06 Mar 2020 | <p>Added the "Constrain Filter Value Lookups by Search Results" feature.</p> <p>Updated the Description of "Removing Validation that Prevents State Changes in Multi-Document Workflows When a Document is Checked Out" to better reflect the feature's functionality.</p> <p>Updated the GxP Risk of the following features: - "New Shared Field for CLM iOS Native Resolution" from "N/A" to "Low" - "Agreement Wizard" from "Low" to "N/A"</p> | The RIA now includes up to date Descriptions, GxP Risks, and a list of all features in 20R1. |
| 03 Mar 2020 | <p>Updated the Default Impact of "RIM Data Model Updates for 20R1" from "Visible to All Users" to "Visible to Admins Only".</p> <p>Updated the GxP Risk of "Study Team Role Field Enhancements" from "Low" to "High".</p> <p>Removed the "EDL Hierarchy Viewer: Behavior Change for Saving EDLs" feature.</p> | The RIA now includes up to date Default Impact, GxP Risks, and a list of all features in 20R1. |
| 24 Feb 2020 | Initial RIA Published | N/A |

