

Veeva Vault Vault 20R3 Release Impact Assessment

The Release Impact Assessment (RIA) documents the new capabilities introduced in Vault in 20R3 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 20R3, will be available in the Veeva Compliance Docs (VeevaDocs) vault on November 2nd. Refer to the Enablement and Default Impact for each feature to determine the visibility and configuration requirements. On October 26th, the [20R3 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: 01 Dec 2020

This feature list is subject to change prior to the 20R3 release. We will begin tracking changes on October 12th, 2020. Updates will stop on December 4, 2020.

Feature:	Name of the feature introduced in 20R3
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	Long-Text Trip Report Question Responses & Comments	Medium	Admin Checkbox	Visible to Admins Only	This feature allows customers to use a long text field for their Trip Report Question responses and comments, allowing for a maximum character length of 32,000 instead of the current 1,500. *Enabling this feature requires a small migration of the data from the current text field to the new long text field.
	CTMS	Displaying Instructions on Trip Report Questions	Medium	Configuration	Visible to Admins Only	This feature allows Admins to enter instructions for how a user should answer their Trip Report questions. These instructions are visible to users via a clickable icon on the Trip Report Question.
	CTMS	Displaying Required Responses & Comments in Trip Report Questions	Medium	Configuration	Visible to Admins Only	This feature allows CRAs to easily see which questions require responses on their Trip Report Questions. For multiple-choice questions, Admins can specify which answers require comments. *This feature is auto-on when the Response Required field on a Question record is set to Yes.
	CTMS	Auto-Populate Milestones from Subject Data	Low	Admin Checkbox	Visible to Admins Only	This feature automates the population of the Actual Finish Date field on first and last subject-related Milestone records at the site level.
	CTMS	Additional Subject Milestones	N/A	Auto-on	Visible to All Users	This feature adds New First Subject Out, First Subject Treated, and Last Subject Treated Milestone Types to CTMS vaults.
	CTMS	One-Click Trip Report Question Data Entry	N/A	Auto-on	Visible to All Users	This feature improves the entry of Trip Report question responses and comments by allowing CRAs to one-click select multiple-choice responses and one-click type into text response and comment fields.
	CTMS, SiteConnect, Study Startup, Vault Payments, eTMF	Milestone Completeness Snapshot	Medium	Auto-on	Visible to All Users	This feature updates the milestone autocomplete job to lock a milestone's completeness metrics when it is marked done and prevent additional updates. It also updates the job that sets the Milestone document field to only modify

						that field on the current document version and only add open milestones to it. *Updates to the milestone autocomplete job are auto-on in vaults with the Milestone Autocompletion feature enabled. Updates to the job that sets the Milestone document field are Auto-on in vaults with the Manage Milestone field value by Expected Documents feature enabled.
	CTMS, Study Startup, Vault Payments, eTMF	Auto-Manage Principal Investigator Field on Study Site	Low	Auto-on	Visible to All Users	This feature allows customers to auto-manage the Principal Investigator field on Study Site with the use of the Study Person object.
	CTMS, Study Startup, Vault Payments, eTMF	Clinical Data Model Changes	N/A	Auto-on	Visible to All Users	With every release, we update the data model to better support evolving needs and new feature functionality.
	CTMS, Study Startup, Vault Payments, eTMF	Study Organization Levels	N/A	Auto-on	Visible to All Users	The Study Organization object now includes the Level field to indicate study-, country-, or site-level. In Vault Payments vaults, this field is populated based on related fields on the Study Organization record.
	CTMS, SiteConnect, Vault Payments	Site Connect: Payment Letters & Site Invoices	N/A	Auto-on	Visible to All Users	With this feature, Vault Site Connect customers can send Payment Letters and Requests for Site Invoices to SiteVault sites. *Auto-on in CTMS vaults with Vault Site Connect and Vault Payments enabled.
	CTMS, SiteConnect, eTMF, Study Startup	Data Model Changes to Support Simple TMF Transfer & Vault Site Connect	N/A	Auto-on	Visible to All Users	This feature activates the collection of objects and document configuration required to use Simple TMF Transfer and Vault Site Connect.
	CTMS, Study Startup, eTMF	Editable Home Page: Labels & Milestone Types	Low	Auto-on	Visible to All Users	This feature updates widget labels on the Startup Specialist Home Page, TMF Home Page, and Study Manager Home Page to reflect the configured labels for the Milestone and Quality Issue objects, as well as for the certain milestone object types and picklist values. This feature also introduces the ability to filter based on Milestone Category.
	Vault Payments	Study Expenses	Medium	Auto-on	Visible to Admins Only	This feature allows users to create Payable Items to track expenses not

						incorporated within a predefined Fee Schedule and Payment Requests for Organizations that aren't related to a specific Study Site. Payment Requests may also combine Payable Items related to the same Organization into a single Payment Request. *Auto-on in vaults with Vault Payments configured.
	Vault Payments	Changes to the Fee & Payable Items Objects	N/A	Auto-on	Visible to All Users	This feature adds the Additional Fee object type to the Fee and Payable Item objects, which may be visible to users. This feature also adds to the Payment Level and Item Description fields to the Payable Item object and the Payment Level field to the Fee object.
	eTMF	TMF Index Management: Core Data Model	Low	Configuration	Visible to Admins Only	This feature adds standard objects, lifecycles, and fields to support the definition, management, and versioning of a client's TMF index, such as document-types and related configuration.
	eTMF	TMF Viewer Doc Type Model Support	Low	Configuration	Visible to Admins Only	This feature adds a fourth view to the TMF Viewer that displays documents according to a customer's configured document type hierarchy, such as a type, subtype, and classification folder structure.
	eTMF	Remove Milestone Inactivation from Archive TMF Job	Low	Auto-on	Visible to All Users	To improve performance, the Archive TMF job no longer inactivates Milestone records.
	eTMF	Remove Study Field Defaulting During Document Upload	Low	Auto-on	Visible to All Users	Previously, when users selected a Study in the Study Selector in the Library and later uploaded a document, Vault populated the document's Study field with the selected Study value. This feature removes the auto-population behavior.
	eTMF	TMF Viewer Level Support & Additional Enhancements	Low	Auto-on	Visible to All Users	This feature allows users to filter the TMF Viewer contents to study- and country-level documents using a new system-managed Filing Level field. Additional enhancements include freezing the top row and the option to display Artifact numbers on the Reference Model folder structure.
	eTMF	TMF Homepage Review	N/A	Auto-on	Visible to All Users	This feature includes improvements to the

		Overcount Link				Review Overcount link on the TMF Homepage to help users attempting to view an Overcount report with more than 200 items. Users are now alerted to adjust their filter settings before navigating to the report to ensure documents display as expected.
	Study Startup, eTMF	Securing Quality Issues	High	Admin Checkbox	Visible to Admins Only	This feature allows customers to secure Quality Issue records by study with new Study and Content (blinding__v) fields on the Quality Issue object.
	SiteConnect	Site Connect: Safety Distribution	Medium	Configuration	Visible to Admins Only	This feature allows sponsors and CROs to send safety reports and letters to sites using SiteVault. These Safety Distribution components give sponsors and CROs the ability to define a set of country-specific distribution rules and to track the delivery and acknowledgment of these distributions across their study sites. *This feature may not be validated in pre-release vaults.
	SiteConnect	Site Connect: Completed CRFs	N/A	Configuration	Visible to Admins Only	Vault Site Connect customers can now send a completed CRFs package to their SiteVault sites.
	SiteConnect	Smart Profile Document Transfer	N/A	Auto-on	Visible to All Users	Vault Site Connect can now create and classify profile documents transferred to Clinical Operations vaults from SiteVault based on role-specific information tracked in SiteVault.
SiteVault	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	SiteConnect, SiteVault Enterprise, SiteVault Free	Safety Distribution: SiteVault	Medium	Auto-on	Visible to All Users	SiteVault users will now receive a daily digest notification when safety distribution documents have been received from a given Sponsor/CRO using Site Connect. *This feature may not be validated in pre-release vaults.
	SiteVault Enterprise, SiteVault Free	Patient & Participant Data Model	Medium	Auto-on	Visible to Admins Only	This feature adds core objects and fields needed to support upcoming enhancements to SiteVault, including integration with MyVeeva for Clinical Trials.
	SiteVault Enterprise,	Document Type Additions	N/A	Auto-on	Visible to Admins Only	New document types have been added

	SiteVault Free					for invoices, which can be directly received in SiteVault from Sponsors/CROs who use Veeva Site Connect. Document types for Completed CRFs, Adverse Event Logs, Study Site Contact Info, and Equipment Logs have also been added.
	SiteVault Enterprise, SiteVault Free	Research Organization Object	N/A	Auto-on	Visible to Admins Only	The Research Organization object provides a way to group the research sites in an Enterprise SiteVault. This functionality will be expanded upon in future releases.
	SiteVault Enterprise, SiteVault Free	Source Upload: Preview Files	N/A	Auto-on	Visible to All Users	When uploading source documents via the Source Upload tab, users can now preview the first page of each document by click on the corresponding preview icon.
	SiteVault Enterprise, SiteVault Free	SiteVault - MyVeeva: Integration User	N/A	Support	None	This feature provisions a secure Admin user account that is used exclusively by MyVeeva to support productized integration between MyVeeva and SiteVault.
	SiteVault Enterprise, SiteVault Free	Source Upload Enhancements	N/A	Support	None	When enabled, this feature adds a Document Type column to the Source Upload grid, allowing SiteVault users to upload other types of source documents, such as deviation logs, AE logs, and signed ICFs. Additionally, SiteVault now warns users if it detects an existing source document of the chosen type for the same participant.
Commercial	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	MedComms	Enhancements to Medical Inquiry Case Response Email Capabilities	Medium	Configuration	Visible to Admins Only	Enhancements to Medical Inquiry Case Response Email functionality include the ability to: add CC and BCC recipients; remove the Vault header and footer from all emails; and define email addresses that can be set as the Reply To field.
	MedComms	Case Response Email Body Rendering	Low	Configuration	Visible to Admins Only	When this feature is enabled, Vault renders Case Response Emails as the Case Contact receives them, rather than in HTML.

	MedComms	Medical Inquiry: Cover Letter Generation Enhancements	Low	Configuration	Visible to Admins Only	This feature allows Admins to configure cover letters that are specific to a particular Case Response.
	MedComms, PromoMats	Related Portals	Low	Configuration	Visible to Admins Only	Portal Admins can now associate multiple Portals, allowing users to search results from the current and any related Portals.
	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	eCTD Compliance Package Generation	High	Configuration	Visible to Admins Only	This feature helps customers meet FDA guidelines released in June 2019 by allowing users to automatically generate a new eCTD Compliance Package with Submission Ready Copies of the documents and convert Vault link annotations to relative PDF links. The Compliance Package can then be exported to a Publishing tool to submit to the FDA. Note: The pre-existing Create Compliance Package bulk action will remain, and Admins will need to configure the new Compliance Package functionality. *Validation of core functionality is available with the release of 20R3.
	PromoMats	Configurable Standard Metrics	Low	Auto-on	Visible to All Users	This feature makes the Global Content Type, Content Creation Currency, and Content Creation Cost fields not required by default. Configuration options available to other standard fields are now available to Standard Metrics fields.
	PromoMats	Standard Metrics Job to Update Global Content Type to Mapped Value	N/A	Auto-on	Visible to All Users	This feature allows Vault Owners to run a new asynchronous job called Standard Metrics GCT Mapping Document Update with a new public API. This job will run automatically with the 20R3 release and will update any documents whose Global Content Type is "Not Specified" to a mapped Global Content Type value.
Quality	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	QMS	Audit Finding External Response Collaboration	Medium	Configuration	Visible to Admins Only	This feature introduces components and configurations to streamline temporary,

						short-term access to customer's vault for suppliers, partners, contractors, or other external parties who need to respond to audit findings.
	QMS	Audit Program Planning	Medium	Configuration	Visible to Admins Only	This feature allows QMS customers to leverage a standard data model and feature set to initiate, plan, and approve audit programs to be executed by a company for a given time period.
	QMS	Issue Escalation & Notification	Medium	Configuration	Visible to Admins Only	This feature enables QMS customers to traceably record severe issues that are surfaced through Quality events and relate those issues back to the originating event. Issues can then be escalated to management for awareness and triaged to closure.
	QMS	Quality Teams: Replace Invalid Team Assignments	Low	Auto-on	Visible to All Users	This feature allows QMS customers leveraging Quality Teams to better control invalid user replacement when managing Quality Teams.
	Training, Station Manager, Surveillance, QMS, QualityDocs	Quality Data Model Changes	N/A	Auto-on	Visible to All Users	With every release, we update the data model to better support evolving needs and new feature functionality.
	Quality	Hide Training Report from Document Actions Menu	Low	Admin Checkbox	Visible to Admins Only	This feature hides the Training Report from the document Actions menu for customers who do not utilize Read & Understood functionality in Quality vaults.
	QualityDocs	Update MDCC Document Picker Dialog	N/A	Auto-on	Visible to All Users	The document selection dialogs for Multi-Document Change Control are updated to provide a consistent user experience throughout the Vault Quality application.
	Surveillance	Vault Product Surveillance	High	Support	None	Vault Product Surveillance is a new application add-on for QMS to support Medtech / Medical Device and Diagnostics customers in reporting adverse event information to health authorities. *This feature may not be validated in pre-release vaults.
	Training	Learner Homepage	Medium	Configuration	Visible to Admins Only	This feature introduces the Learner Home Page, an intuitive, easy to use place for Learners to view and complete Training Assignments. *This feature may not be validated in pre-release vaults.

	Training	Mobile Training Task Completion	Low	Configuration	Visible to Admins Only	This feature allows Learners to complete supported training assignments from mobile devices in a mobile-friendly way. *This feature may not be validated in pre-release vaults.
Regulatory	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	RIM Publishing	Japan eCTD XSD 1.0 Publishing & Validation	High	Configuration	Visible to Admins Only	Users in RIM Publishing vaults can now create content plans and generate submissions that are compliant with the JP eCTD 1.0 specification. Vault validates these submissions based on the corresponding JP v1.0 Validation Criteria.
	RIM Publishing	Jordan eCTD DTD 1.1 Publishing & Validation	High	Configuration	Visible to Admins Only	Users in RIM Publishing vaults can now create content plans and generate submissions that are compliant with the JO eCTD v1.1 (DTD 1.1) specification. Vault validates these submissions based on the corresponding JO v1.1 Validation Criteria.
	RIM Publishing	Support Health Canada Validation Profile v5.0	High	Configuration	Visible to Admins Only	RIM Submissions Publishing vaults now support validating Health Canada eCTD submissions using the Health Canada eCTD v5.0 validation rules. *This feature may not be validated in pre-release vaults.
	RIM Publishing	US FDA eCTD Specification v2.4 Support	High	Configuration	Visible to Admins Only	This release updates RIM Publishing vaults to support the new REMS Supplement Submission Type, announced in the US FDA eCTD Specification v2.4. Note that there is no associated DTD update.
	RIM Publishing	Linking to Submissions Archive Content	Medium	Auto-on	Visible to All Users	Users in RIM Publishing vaults can now publish Vault link annotations and permalinks that target content within Submissions Archive, allowing for hyperlinks to previously submitted content. *This feature may not be validated in pre-release vaults.
	RIM Publishing	Update Hyperlinking Creation Logic	Medium	Auto-on	Visible to All Users	This feature improves the logic used to create hyperlinks in Submissions Publishing vaults, allowing for more accurate link creation and cross-

						submission or cross-application linking. *This feature may not be validated in pre-release vaults.
	RIM Publishing	Publishing Improvements for Split Content Plan Items	N/A	Auto-on	Visible to All Users	When continuous publishing is enabled on vaults with RIM Publishing, Vault now runs an on-demand publishing job on the parent content plan once the Split Content Plan Item user action completes.
	RIM Publishing, RIM Registrations, RIM Submissions, RIM Submissions Archive	Auto-Create Application Country & Submission Country Joins	Low	Admin Checkbox	Visible to Admins Only	This feature adds new settings on the Application Settings page that enable Vault to create new join object records automatically when users create Submission records and create or update Application records.
	RIM Publishing, RIM Registrations, RIM Submissions, RIM Submissions Archive	20R3 Regulatory 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.
	RIM Registrations	Additional Registration Scopes in Create Registrations	Medium	Configuration	Visible to Admins Only	The Create Registrations wizard now supports bulk creation of Active Substance registrations, Manufacturing Site (Establishment) registrations, Product and Product Group registrations for medical devices, and Product registrations for site-based markets. *This feature may not be validated in pre-release vaults.
	RIM Registrations	Additional Registration Scopes in Manage Registered Details	Medium	Configuration	Visible to Admins Only	The Manage Registered Details wizard now supports bulk management of Active Substance registrations, Manufacturing Site (Establishment) registrations, Product and Product Group registrations for medical devices, and Product registrations for site-based markets. *This feature may not be validated in pre-release vaults.
	RIM Registrations	Configurable Impact Assessment Reports	Medium	Configuration	Visible to Admins Only	Enhancements to regulatory impact assessment reports allow for more comprehensive impact assessments through targeted cross-object reporting. This feature also adds support for medical device details and includes the ability to configure business-specific filters on the

						reports to reduce additional work for end users.
RIM Registrations	Pause RIM Registrations Vault Java SDK Triggers	Low	Admin Checkbox	Visible to Admins Only		Customers performing large migrations that do not wish to have the RIM Registrations Vault Java SDK triggers running can now pause these from the Application Settings page to prevent automatic record creation and updates. This will pause creation of Country Decision Detail records as well as creation of records related to Administered Products.
RIM Registrations	IDMP Phase 2: Data Model	N/A	Auto-on	Visible to Admins Only		This feature updates the RIM Registrations data model to further support the IDMP dataset. The full IDMP feature set will be delivered across multiple releases.
RIM Registrations	Enablement Change: IDMP	N/A	Configuration	Visible to Admins Only		Customers who wish to configure the IDMP functionality can now do so without contacting Vault Support to request the feature. This does not automatically enable the feature, but makes the configuration options available to Admins.
RIM Registrations	Create Activities per Application	Medium	Auto-on	Visible to All Users		This feature allows users to create Activity records through the Create Related Records wizard at an additional level of granularity. Users can now create one activity per application, even if the application spans multiple products. The existing scope for Application has been renamed to Application and Product to better reflect the actual behavior.
RIM Registrations	Create Registrations Enhancements	Medium	Auto-on	Visible to All Users		This feature provides updates to the Create Registrations wizard, including: more control over which details users want to include in registrations; new grids to the wizard UI; the ability to choose whether or not to create separate registrations for complex products and their component products; and the ability to include multiple products on Investigational Study and Site registrations. *This feature may not be validated in pre-release vaults.

	RIM Registrations	IDMP Phase 2: Algorithms	Medium	Auto-on	Visible to All Users	This feature updates the aggregation algorithm that will recurse through RIM Registrations data to compile submission data in new IDMP objects. The full IDMP feature set will be delivered across multiple releases. *Auto-on in vaults with IDMP Phase 1 enabled and configured. **This feature may not be validated in pre-release vaults.
	RIM Registrations	Manage Registered Details Enhancements	Medium	Auto-on	Visible to All Users	Enhancements to the Manage Registered Details wizard include: better enforcement of object relationships to prevent bad data; the ability to add additional details for multiple products to the same Investigational Study or Investigational Site registration; and the ability to add and update medical device details in vaults that use Submission object data as the source for the wizard. *This feature may not be validated in pre-release vaults.
	RIM Registrations	Filter Grids & Select All in Manage Registered Details Wizard	N/A	Auto-on	Visible to All Users	This feature adds enhancements to the Manage Registered Details wizard UI, including column filters on the grid pages and the ability to select all values in the grid, up to 1,000 records.
	RIM Submissions	Support for Default Values in Field Rules	N/A	Configuration	Visible to Admins Only	The eTMF & Submissions Spark Connection now supports the inclusion of default values within the integration's field rules.
	RIM Submissions	Additional Filtering in Content Plan Hierarchy Viewer	Low	Auto-on	Visible to All Users	This feature extends filtering functionality in the Content Plan Hierarchy Viewer to support Date, Object Reference, Picklist, and Lifecycle State fields. *Auto-on in vaults with the Content Plan Hierarchy Viewer enabled.
	RIM Submissions	Save Views in Content Plan Hierarchy Viewer	Low	Auto-on	Visible to All Users	Users can now save and share custom views in the Content Plan Hierarchy Viewer to bookmark current column selections, column order, most filters, and the Show Inactive/Hide Inactive setting. *Auto-on in vaults with the Content Plan Hierarchy Viewer enabled.
	RIM Submissions	Enablement Change:	N/A	Configuration	Visible to Admins Only	In past releases, an organization needed

	Archive	Submission Import with Vault File Manager				to contact Veeva Support to enable submission import with Vault File Manager. Now, Admins can enable this feature by selecting a checkbox on the Application Settings page and performing additional configurations.
	RIM Submissions Archive	Submissions Archive: Jordan 1.1	Medium	Auto-on	Visible to All Users	RIM Submissions Archive vaults now support importing and viewing Jordan 1.1 DTD submissions.
	RIM Submissions Archive	Import Submissions with Unreferenced Files Using Vault File Manager	Low	Auto-on	Visible to All Users	Users can now select multiple folders when uploading an eCTD submission dossier with Vault File Manager, including the eCTD submission folder, a working documents folder, and other folders containing unreferenced files. Vault processes the selected folders as a single import and displays the working documents folder alongside the eCTD submission content in the Submissions Archive Viewer.
	RIM Submissions Archive	Add Submission Import Information to Notification Token	N/A	Auto-on	Visible to All Users	This feature adds additional import details to the token used in the Submissions Archive import notifications, allowing users to see the application folder name, the submission folder name, and the number of files when they receive these notifications.
	RIM Submissions Archive	Enhancements to Submission Import with Vault File Manager	N/A	Auto-on	Visible to All Users	Updates to the Submission Import with Vault File Manager feature include: the ability to retry failed uploads in Vault File Manager; a new upload status when uploads fail due to reasons besides dropped connections or in-use documents; and a Skip Upload action to send a document to the end of the upload queue. *Auto-on in vaults with Submission Import with Vault File Manager enabled.
	RIM Submissions Archive	FTP Folder Selection Update	N/A	Auto-on	Visible to All Users	This feature updates Submissions Archive FTP default selection functionality to leverage dossier format parameters, application folder names, and sequence folder names.
	RIM Submissions Archive	Submissions Archive Ordering Update	N/A	Auto-on	Visible to All Users	Vault will now display newly-imported submission eCTD files above the eCTD

						section. Vault will also order files within non-eCTD sections based on the Actual Submission Date field or the date and time of the import.
	RIM Submissions Archive	Submissions Archive Viewer Display Update	N/A	Auto-on	Visible to All Users	Within the Submissions Archive Viewer, sections and document names can now display up to 250 characters.
	RIM Submissions Archive	Submissions Archive Viewer Document Download	N/A	Auto-on	Visible to All Users	When users open documents from the Submissions Archive Viewer, they will now see the option to download the document or the rendition.
Mobile	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	Station Manager	Sync Interval Update	Medium	Auto-on	Visible to All Users	The interval at which Station Manager syncs with Vault has been updated to sync every 15-20 minutes.
	Station Manager	Video Support on Android	Medium	Auto-on	Visible to All Users	Customers can now assign video files for playback within Station Manager for Android.
	Station Manager	Custom URL & QR Code Support for Categories on Android	Low	Auto-on	Visible to All Users	Customers can generate custom URLs for a category of documents assigned to Station Manager. When a manufacturing operator opens these custom URLs on their tablet device, it opens the specified category in the Station Manager mobile app.
	Station Manager	Custom URL & QR Code Support for Categories on iOS	Low	Auto-on	Visible to All Users	Customers can generate custom URLs for a category of documents assigned to Station Manager. When a manufacturing operator opens these custom URLs on their tablet device, it opens the specified category in the Station Manager mobile app.
	Station Manager	Maintain Document State on Android	Low	Auto-on	Visible to All Users	Station Manager remembers the position where a user last viewed a document or video and returns them to that position if they navigate away and return within 4 hours.
	Station Manager	Maintain Document State on iOS	Low	Auto-on	Visible to All Users	Station Manager remembers the position where a user last viewed a document or video and returns them to that position if they navigate away and return within 4 hours.

	Station Manager	Application Icon Update on Android	N/A	Auto-on	Visible to All Users	The application icon for Station Manager for Android has been updated.
	Station Manager	Login with Keyboard on Android	N/A	Auto-on	Visible to All Users	Users can now complete the Station Manager login flow using the tablet device keyboard.
	Station Manager	Settings Page Updates on Android	N/A	Auto-on	Visible to All Users	The Settings page for Station Manager for Android now displays the Station Device record name and the mobile application version.
	Station Manager	Video Auto-Play Update on iOS	N/A	Auto-on	Visible to All Users	Videos do not play in Station Manager for iOS until the user taps the play button, to provide a consistent user experience regardless of the navigation path to a video.
	Veeva Snap	Azure Support for Veeva Snap	High	Configuration	Visible to Admins Only	This feature allows Veeva Snap to support Azure Active Directory (Azure AD), Microsoft's cloud-based identify access management service.
Platform	Application	Feature Name	GxP Risk	Enablement	Default Impact	Description
	Platform	OAuth Profiles: Enable Azure as a Standalone Authorization Server Type	High	Auto-on	Visible to Admins Only	This feature splits the Authorization Server Type configuration for ADFS / Azure AD on OAuth / OpenID Connect Profiles into two separate options: ADFS and Azure AD. By default, all configurations with the ADFS / Azure AD Authorization Server Type will be set to ADFS after this release.
	Platform	Atomic Security for Active Workflow Actions in Objects	High	Configuration	Visible to Admins Only	Admins can now secure the following actions in active object workflows based on lifecycle state and role: Cancel Workflow, Cancel Task, Reassign, Add Participants, and Update Task Due Date.
	Platform	Managing Sandbox Allowances	Medium	Auto-on	Visible to Admins Only	This feature enables Admins to manage sandbox allowances across all their sandboxes through the UI and the REST API. Admins can manage sandboxes created from the logged-in vault as well as clones created from another sandbox.
	Platform	Asynchronous Cascade Delete for Checklist Design	Medium	Configuration	Visible to Admins Only	This feature, when configured, allows users to cascade delete a checklist

						design and all the related records asynchronously using a new user action.
Platform	Audit Action Security for Objects	Medium	Configuration	Visible to Admins Only		This feature allows Admins to hide the View Audit Trail action for records based on object, state, and role. By default, users' audit permissions will remain unchanged.
Platform	Object & Multi-Document Workflows: Update Sharing Settings in Task Step	Medium	Configuration	Visible to Admins Only		Admins can now define a Task step in a workflow to add users to or remove users from roles by updating the Sharing Settings on an object record or a document upon task completion, cancellation, or assignment. An additional Update Sharing Settings step in the workflow is no longer required.
Platform	Sibling Record State Check Entry Action	Medium	Configuration	Visible to Admins Only		This feature allows Admins to configure a lifecycle state entry action that checks the state of sibling records and, if they are all in a defined state, updates the lifecycle state of the parent record or the related record.
Platform	Generate Outbound Package from Vault Compare	Low	Auto-on	Visible to Admins Only		The Vault Comparison feature has been enhanced to optionally generate Outbound Packages based on the differences found in the comparison report. Each Outbound Package in the generated sequence can contain up to 200 components.
Platform	SDK Job Administration	Low	Auto-on	Visible to Admins Only		This feature enables Admins to manage SDK Jobs through the new SDK Job Metadata UI on the Admin > Operations page.
Platform	Update Expressions in Workflow & Lifecycle	Low	Auto-on	Visible to Admins Only		This feature adds support for populating Picklist and Yes/No fields using lifecycle and workflow formulas. In addition, the UI for defining formulas in document lifecycles and workflows is updated.
Platform	Vault Loader Bulk Remove Users from Document Roles	Low	Auto-on	Visible to Admins Only		This feature adds support for bulk removal of users from document roles to the Vault Loader UI, Command Line Tool (CLI), and the Multi-File Load REST API.
Platform	Checklist Question Guidance Text	Low	Configuration	Visible to Admins Only		This feature provides Admins with the option to include guidance text for a question to help checklist respondents

						better understand a question and provide an appropriate answer.
	Platform	Configurable Landing Tabs	Low	Configuration	Visible to Admins Only	This feature allows Admins to configure which tab a user first sees when they log in to Vault, instead of navigating them to the Home tab by default.
	Platform	Default by Object Type	Low	Configuration	Visible to Admins Only	Admins can now configure object field default overrides at the object type level. When an object record of that object type is created, Vault populates the field with the configured default value for that object type instead of a default value configured for the base object type.
	Platform	Flexible Job Scheduling	Low	Configuration	Visible to Admins Only	This feature expands the options for scheduling jobs to allow hourly, daily, weekly, and monthly jobs. Previously, Admins could only schedule daily jobs from the Vault Admin UI.
	Platform	High Volume Object	Low	Configuration	Visible to Admins Only	This feature adds an alternative data store option for Vault objects, optimized for large or frequent transactions.
	Platform	Integration Rule Query Object Filters	Low	Configuration	Visible to Admins Only	Integration query object rules expand Integration Rule functionality to allow Admins to define rules that restrict the data or documents sent to a target vault in HTTP callbacks associated with Spark Messaging integrations.
	Platform	Join Report Views Using Number Fields	Low	Configuration	Visible to Admins Only	This feature allows Admins to join report views together using Number fields.
	Platform	Object & Multi-Document Workflows: Ad Hoc Task Instructions	Low	Configuration	Visible to Admins Only	This feature adds the ability for the Workflow Initiators to add optional or required task instructions for participant groups in object workflows and multi-document workflows. An Admin must add a token to notification or email templates in order to support task instructions.
	Platform	Object & Multi-Document Workflows: Additional Task & Workflow Initiator Tokens	Low	Configuration	Visible to Admins Only	This feature adds support for additional tokens in message templates for object workflows and multi-document workflows. The new tokens support Workflow Initiators, Task Comments, and Task Verdicts. Admins can also select Task

						Verdict tokens from previous tasks in a Notification step of the workflow.
Platform	Object & Multi-Document Workflows: Default Users from Sharing Settings	Low	Configuration	Visible to Admins Only		Admins can now configure object and multi-document workflows to have users and groups auto-populated at the workflow start step based on their roles on the record or the documents. For multi-document workflows, Vault only auto-populates users and groups if they are in that role on every document in the workflow.
Platform	Object Workflows: Task Comment & Object Type Tokens	Low	Configuration	Visible to Admins Only		Object workflows now support Object Type and Task Comment tokens in object messages. Admins can also add notifications from previous tasks in the Notification section of the Task step itself.
Platform	Section Level Help	Low	Configuration	Visible to Admins Only		Admins can define custom help content that appears on sections within object record detail pages.
Platform	Configuration Migration Review & Deploy Performance Optimizations	N/A	Auto-on	Visible to Admins Only		This feature introduces performance optimization and pagination support for the Review & Deploy UI. In addition, Vault now includes the Description column in the default list layout of the Inbound Packages and Outbound Packages pages in vaults where the default list layout has not been modified.
Platform	Domain User UI Enhancement	N/A	Auto-on	Visible to Admins Only		The Vault Memberships section on the Domain User object record detail page now lists only vaults for which the domain user has an active or inactive Vault membership.
Platform	Exclude Security Overrides Referencing Auto-Managed Groups When Migrating Document Fields	N/A	Auto-on	Visible to Admins Only		When creating an Outbound Migration Package which includes a document field, Vault excludes Security Overrides if they reference Auto Managed Groups.
Platform	FTP Staging Permission Name Update	N/A	Auto-on	Visible to Admins Only		This release renames the FTP Staging application permission to File Staging.
Platform	Page Permission	N/A	Auto-on	Visible to Admins Only		When a Vault application provides a Page to display certain application features, Admins can grant access to view the page via the View permission.
Platform	Pages Admin Permission	N/A	Auto-on	Visible to Admins Only		When a Vault application provides a

						configurable Page, Admins can use the Pages permission to grant View and Edit permission to control which user can configure the Page.
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	Spark Messaging Field Rules: Additional Data Type Support for Field Defaults	N/A	Auto-on	Visible to Admins Only		Field rules for Spark Messaging integrations now support Number, Yes/No, Date, DateTime, and Picklist fields in the field defaults, supplementing the existing string and array data types.
Platform	Support Upsert with Object Types	N/A	Auto-on	Visible to Admins Only		This feature updates the default behavior for the Upsert action in Vault Loader to ignore values in Object Type fields and in Parent Object-type fields if the object record already exists and the value has not changed. In previous releases, Upsert operations would fail because these field types become read-only after initial record creation.
Platform	Vault Configuration Report Enhancements	N/A	Auto-on	Visible to Admins Only		This feature introduces an updated UI for component and object data selection, as well as enhancements to the Microsoft Excel cover page and table of contents for better readability.
Platform	Checklist Enhancement: Decimal Response	N/A	Configuration	Visible to Admins Only		This feature allows Admins to specify the number of decimal places for number questions that users are allowed to enter in a checklist response.
Platform	Show Current Time in Overlays	N/A	Configuration	Visible to Admins Only		Admins can add a new token to display the current time and time zone on document overlays.
Platform	Auto Claims Linking: Create Claims from Link Annotations	Medium	Auto-on	Visible to All Users		Users can now create Claims records in bulk from existing link annotations using a new bulk action and Vault Loader. *Auto Claims Linking is auto-on in PromoMats vaults only. This feature is currently unavailable in other vaults.
Platform	Auto Claims Linking: References in Audit Trail	Medium	Auto-on	Visible to All Users		This feature allows users to see changes to related objects, including Link Targets and Match Text Variations, in the Claims audit trail, providing comprehensive visibility to important changes to a Claim.

						*Auto Claims Linking is auto-on in PromoMats vaults only. This feature is currently unavailable in other vaults.
	Platform	Auto Claims Linking: Simple Version Binding on References	Medium	Auto-on	Visible to All Users	Vault no longer removes references from a Claim record when the targeted document is up-versioned. Once a user adds a reference to a specific version, it remains unmodified regardless of the creation of a new version of the document. *Auto Claims Linking is auto-on in PromoMats vaults only. This feature is currently unavailable in other vaults.
	Platform	Object & Multi-Document Workflows: Undo Acceptance of Tasks	Medium	Auto-on	Visible to All Users	Object and multi-document workflow task recipients can now undo acceptance of an optional task. When a user selects "Undo acceptance", Vault returns the task back to the list of Available Tasks.
	Platform	Object & Multi-Document Workflows: Update Task Due Date	Medium	Auto-on	Visible to All Users	This feature allows users with the correct permissions to update task due dates in object and multi-document workflows or add a task due date if none has been set yet. Due dates must be set to a date in the future.
	Platform	Read & Understood Download Button Visibility Update	Medium	Auto-on	Visible to All Users	Users now require Download Rendition permission and a document role with View Content permission in order to see and use the Download button for Read & Understood documents.
	Platform	Auto Claims Linking: Add Annotation (Approved Links) Field	Low	Auto-on	Visible to All Users	Vault now counts Manual Links and Approved Links in two fields: Manual Links (annotations_links__v), and Approved Links (annotations_approved__v). Previously, both types of links were counted in annotations_links__v. *Auto Claims Linking is auto-on in PromoMats vaults only. This feature is currently unavailable in other vaults.
	Platform	Auto Claims Linking: Excluded Characters	Low	Auto-on	Visible to All Users	Vault defines a set of characters (©, ®, ™, ℠) to be ignored when comparing Match Text and Match Text Variation values to document content. Admins can view and edit the list of excluded characters. *Auto Claims Linking is auto-on in PromoMats

						vaults only. This feature is currently unavailable in other vaults.
	Platform	Auto Claims Linking: Where Used Enhancements	Low	Auto-on	Visible to All Users	This feature adds two columns to Claims' Where Used component: Document Number and Document Status. Users can choose which columns to display. *Auto Claims Linking is auto-on in PromoMats vaults only. This feature is currently unavailable in other vaults.
	Platform	Changes to Make a Copy for Read-Only Fields	Low	Auto-on	Visible to All Users	When a user chooses to Copy Fields while making a copy of a document, any Read Only fields now retain their values. If the user chooses not to copy fields, the fields are populated with any default values configured by an Admin.
	Platform	Combine Dashboard Prompts	Low	Auto-on	Visible to All Users	This feature combines dashboard prompts referencing the same object and using the same operator, helping to reduce redundant data entry when users interact with dashboards.
	Platform	Cross-Document Links in Binders	Low	Auto-on	Visible to All Users	This feature enables navigation of cross-document relative-path links within binders for links embedded in content and document bookmarks.
	Platform	Early Timeout Detection for Reports	Low	Auto-on	Visible to All Users	Vault can now predict if a single entity report will time out and display an error message advising the user to add filters or schedule a flash report.
	Platform	Enhanced Large Size Asset Upload via API	Low	Auto-on	Visible to All Users	This feature adds an additional, more effective way to import Large Size Asset renditions. Users can now upload files to any folder on the File Staging Server, other than the "Inbox" folder, and use the Add Multiple Document Renditions Vault REST API endpoint to upload these files as renditions for existing documents. If using this API to upload Large Size Asset renditions, users should set the new largeSizeAsset query parameter to "true".
	Platform	Enhancement to Import Document Links	Low	Auto-on	Visible to All Users	Vault now displays the latest version of documents for which the user has View Document permission and which contain at least one Linked Document relationship. Previously, Vault only

						displayed a document if it was the absolute latest version and had at least one Linked Document relationship.
Platform	Object & Multi-Document Workflows: Participant Control Help Labels	Low	Auto-on	Visible to All Users		Workflow Initiators for object and multi-document workflows can see the "Assigned to every user" or "Available to any user" labels on the participant control at the start of the workflow. The label that Vault displays depends on whether tasks in the workflow use the "Assign to all users in a participant group" or the "Make available to users in the participant group" option.
Platform	Object Formula Fields in Reports	Low	Auto-on	Visible to All Users		Users can now define formula fields directly in their reports.
Platform	Support Is Latest Version in Matched Document & Relationship Reports	Low	Auto-on	Visible to All Users		This feature adds support for the Is Latest Version field in Matched Document and Document Relationship Reports.
Platform	Apply Title to Multiple Documents	N/A	Auto-on	Visible to All Users		When performing a multi-file upload, users can now set the same Title value across multiple documents.
Platform	Auto Claims Linking: Hide Suggest Links Button When No Matching Claims Exist	N/A	Auto-on	Visible to All Users		Vault no longer displays the Suggest Links button or Document/Claim selector on documents when no matching approved Claims exist. *Auto Claims Linking is auto-on in PromoMats vaults only. This feature is currently unavailable in other vaults.
Platform	Auto-Refresh for Check In from Vault File Manager	N/A	Auto-on	Visible to All Users		After users select Check In from Vault File Manager from the document Actions menu, the browser tab now refreshes automatically when the check-in is complete.
Platform	Decrease Maximum Size for Flash Report Emails	N/A	Auto-on	Visible to All Users		This feature reduces the default maximum email size for flash reports in order to avoid potential email distribution issues.
Platform	Filter by All Dates in Object Record Audit Trail	N/A	Auto-on	Visible to All Users		This feature adds the "all" option back to the Timestamp filter in individual object record audit trails. Users may now more easily view and export complete audit trails for records.
Platform	Improved Rendering Feedback	N/A	Auto-on	Visible to All Users		Users can now view failure messages in

						order to troubleshoot rendering issues with source documents.
	Platform	Login Page Enhancement for Mobile Devices	N/A	Auto-on	Visible to All Users	The login form is updated to display the user name and password fields properly on mobile devices.
	Platform	Object Workflow Timeline Enhancements	N/A	Auto-on	Visible to All Users	This release enhances the Workflow Timeline section on the object record detail page to show information about workflow tasks, including verdicts, comments, reasons, and eSignature capacity.
	Platform	Truncated Search Result Warning	N/A	Auto-on	Visible to All Users	Vault now displays a warning when a full-text search is truncated because the search term was found in over 5,000 documents.
	Platform	Persist Relationships from Approved and Auto Links on Make a Copy	Low	Support	None	Once enabled, Vault persists Linked Document relationships from Approved and Auto Links on new documents created via the Make a Copy action. Vault does not copy annotations, only Linked Document relationships. *Auto Claims Linking is only available in PromoMats vaults. This feature is currently unavailable in other vaults.
	Platform	Merge Fields Token Character Length Increase	N/A	Auto-on	None	This feature increases the total length of Merge Field tokens in Microsoft Word DOCX files to a maximum of 1,000 characters. The increase to the maximum character limit allows for ease of use when referencing fields in related object records.

Change Log

This feature list is subject to change prior to the 20R3 release. We will begin tracking changes on October 12th, 2020.

Date	Change	Impact
01 Dec 2020	For the "eCTD Compliance Package Generation" feature: - Updated the GxP Risk from "N/A" to "High" - Updated the Description to include that validation of core functionality is available with the release of 20R3.	The RIA now includes up to date GxP Risks and Descriptions.
13 Nov 2020	Updated the Description of "Study Organization Levels" to better reflect the feature's functionality.	The RIA now includes up to date Descriptions.
10 Nov 2020	Updated the GxP Risk of "Remove Milestone Inactivation from Archive TMF Job" from "N/A" to "Low".	The RIA now includes up to date GxP Risks.
06 Nov 2020	Added the "Remove Study Field Defaulting During Document Upload" feature.	The RIA now includes a list of all features in 20R3.
03 Nov 2020	Added the "Apply Title to Multiple Documents" feature. Updated the GxP Risk of "Smart Profile Document Transfer" from "Medium" to "N/A".	The RIA now includes up to date GxP Risks and a list of all features in 20R3.
30 Oct 2020	Updated the Enablement of "SDK Job Administration" from "Configuration" to "Auto-on".	The RIA now includes up to date Enablement information.
26 Oct 2020	Added links to the 20R3 release notes. Added the "Support Health Canada Validation Profile v5.0" feature.	The RIA now includes links to the 20R3 release notes and a list of all features in 20R3.
23 Oct 2020	Removed the "Set Highest Version for Vault File Manager" feature.	The RIA now includes a list of all features in 20R3.
20 Oct 2020	Updated the GxP Risk of "Create Activities per Application" from "Low" to "Medium". Renamed the following features to better reflect functionality: - "New API Parameter for Adding Large Size Asset Renditions" renamed to "Enhanced Large Size Asset Upload via API" - "Integration Query Object Rules" renamed to "Integration Rule Query Object Filters"	The RIA now includes update to date GxP Risks and Feature Names.



16 Oct 2020	<p>Updated the GxP Risk of the following features</p> <ul style="list-style-type: none"> - "Video Auto-Play Update on iOS" from "Low" to "N/A" - "Settings Page Updates on Android" from "Low" to "N/A" - "Smart Profile Document Transfer" from "Low" to "Medium" - "Show Current Time in Overlays" from "Low" to "N/A" - "Filter by All Dates in Object Record Audit Trail" from "Low" to "N/A" - "Decrease Maximum Size for Flash Report Emails" from "Low" to "N/A" - "New API Parameter for Adding Large Size Asset Renditions" from "Medium" to "Low" - "IDMP Phase 2: Data Model" from "Medium" to "N/A" <p>Added the "**This feature may not be validated in pre-release vaults." note to the Description of "Update Hyperlinking Creation Logic".</p>	The RIA now includes up to date GxP Risks and Descriptions.
13 Oct 2020	Updated the GxP Risk of "Learner Homepage" from "Low" to "Medium".	The RIA now includes up to date GxP Risks.
09 Oct 2020	Second RIA Version Published	The RIA now includes up to date information about features in 20R3.
05 Oct 2020	Initial RIA Published	N/A