

VEEVA CLINICAL DATA TRAINING

Historical Release Notes

A complete version history

Table of Contents

2026

26R1

April 2026

Expands CDB hands-on practice and enhances workflows across updated training courses

2025

25R3

December 2025

Features new EDC simulation activities and advanced query management tools for CDB

25R2

August 2025

Enhances global accessibility through catalog-wide voiceover and visual design refreshes

25R1

April 2025

Launches the CDB Programmer curriculum with foundational Query Metrics Dashboards

2024

24R3

December 2024

Supports early adopters of CDMS Imaging with specialized roles and dedicated curricula

24R2

August 2024

Transitions to Vault Training to provide a unified interface and hourly status refreshes

24R1

April 2024

Establishes the Data Loader and CDB Administrator roles with a focus on Clinical Reporting

2023

23R3

December 2023

Promotes skill application via hands-on practice for sites and new listing builder modules

23R2

August 2023

Defines the Auditor and Read Only roles while expanding training for Snapshots

23R1

December 2023

Improves the learner experience with playback speed controls and optimized quiz density

2022

22R3

December 2022

Minimizes time commitments for Site and Read-Only users through streamlined course content

22R2

August 2022

Broadens global reach with localized training for Korean and Simplified Chinese site users

22R1

December 2022

Offers the first Japanese site options and builds a robust foundation for Veeva CDB

Curricular Changes

- Snapshots course added to DM and LDM curricula for both Simplified Chinese and Korean languages.
- Managing Jobs on the Review Tab course has been added to CRA, DM, and LDM curricula in Japanese, Simplified Chinese, and Korean.
- With both above additions, CRA, DM, and LDM translated curricula in Japanese, Simplified Chinese, and Korean now fully match the English CRA, DM and LDM curricula.

EDC and CDMS

Data Entry in Vault EDC

- Training now reflects the two-step reset process when resetting forms

Local Labs

- Includes lower and upper age modifiers when defining analyte normal ranges

Clinical Reporting Course Enhancements

- Navigating Clinical Reporting and Working with Listings in Clinical Reporting courses now include new features including minimize/maximize buttons, cell decoration navigation, hover filtering, and redesigned filter menus

Safety

- Includes instruction on the new Study Drug Management tab feature

CDB

User Interface Enhancements

- Veeva CDB Overview and Working with Listings courses now include new features including minimize/maximize buttons, cell decoration navigation, hover filtering, and redesigned filter menus

Hands-on Practice Simulations

- The following courses now include Hands-on Practice: Veeva CDB Overview, Working with Listings, Review Listings, Query Workflow, Data Review Workflow and Automated Data Checks

CBD Configurations

- Now includes a detailed explanation of the new Listing Access configuration section

Clean Patient Tracker

- Now includes Substudy and Latest Events columns in the Clean Patient Tracker

Masking and Conditional Unblinding

- Training updated to include Data Type-Specific option when masking data

December 2025

EDC

Coder Tools

- New walkthroughs of the new Query Templates and Dictionary License Validation tabs in Coder Settings

Data Entry in Veeva EDC and EDC Tools

- Now include new Completion Guidelines feature for data entry

Local Labs for Sites

- Content refreshed with new Item Property Panel updates and Age Range Enhancements for Normal Ranges.

Safety Administration

- Now provides a choice between viewing E2B or Veeva Safety-EDC Connection content to match the user's specific safety connection

Hands-on Practice

- Now available in the following courses: Freezing and Locking Data by Subject. Local Labs for Sites, Protocol Deviations, Reports and Dashboards, Snapshots, and SDV/DMR

CDB

Query Workflow

- New Listing-defined Quick Queries and Dynamic Messages features for faster management

Working with Listings, Data Review Workflow, and Review Listings

- Courses now include assigning Observations, navigation using cell decorations and viewing and creating Protocol Deviations

Data Import for Vendors

- Training updated to explain the Package Loader feature for easier third-party data uploads

August 2025

Curricular Changes

- New Reports and Dashboard curriculum containing Reports and Dashboards course

Global and Accessibility Updates

- All courses were updated to increase accessibility regarding larger video captioning, color contrast, and text readability
- All courses now feature new voiceovers for improved consistency and clarity
- Many courses now include brand-new explainer videos and video introductions

EDC

Queries in Vault EDC

- Includes a walkthrough of the Quick Queries feature (if enabled by the study)

Local Labs

- Now includes Fasting Status and Female Cycle enablement for lab form headers and configuring Unknowns for Lab Collection Time and Effective Datetime

Local Labs for Sites

- Updated to include how to enter Unknown Lab Collection Time

Coder Tools

- Refreshed with the new Autocoding Setting

Safety Administration

- Updated to include Secondary Event Linking for both E2B and Safety-EDC connections and added content for Embedding Related Safety Data (specific to E2B)

Imaging

- Content updated to reflect the Increased DICOM Limit

CDB

Review Listings and Data Review Workflow

- Now includes a new section detailing how to open, manage, and close Observations

Query Workflow

- Includes a walkthrough of the Quick Queries feature

Clean Patient Tracker

- Now contains charts detailing cleaning status, including Clean Subjects by Site and Clean Subjects by Status

April 2025

Curricular Changes

- New CDB Programmer curriculum

EDC and CDMS

Coder Overview and Coding in CDMS

- Both courses now include an Answered Queries column on the Summary page

EDC Tools

- Features Export Job History function for easier job export tracking

Imaging and Reviewing Imaging

- Updated courses to feature new exam viewer interface

Safety Administration

- Updated safety form names and Safety Cases (V4) and Safety Messages (V4) reports

CDB

Observations

- The majority of CDB courses now show updated user interface for the new Observations feature

CDB Exports and Monitoring Imports and Exporting Data for Clinical Reporting

- Both courses updated to remove SDTM export type as it is now deprecated, renamed the None export type Custom, and updated issue log layout

Query Workflow and Data Review Workflow

- Now details the Query Metrics Dashboard feature

Imaging and Reviewing Imaging

- Updated courses to feature new exam viewer interface

Safety Administration

- Updated safety form names and Safety Cases (V4) and Safety Messages (V4) reports

December 2024

Curricular Changes

- New Imaging curriculum containing new Imaging: Exam Upload and Verification course
- New Imaging Specialist curriculum containing new Reviewing Images course
- New Veeva CDB Read-Only curriculum containing Clean Patient Tracker and Exports in Veeva CDB
- Data Ingestion for Data Managers and CDB Manifest Builder removed from Veeva CDB View Only curriculum

EDC and CDMS

Coder Features

- Coder now supports the use of Approve Mode reflected in updated training in Coder Approval Workflow and Coding in CDMS
- Training updated in Coder Tools to reflect dictionary downversioning and the ability to update the Dictionary Release

Imaging: Exam Upload and Verification

- New course for early adopters using the Imaging module (if enabled for your Vault).
- Training includes how to upload and review exam images

Reviewing Images

- New course for early adopters using the Imaging module (if enabled for your Vault)
- Training includes how to review images as an Imaging Specialist, a new standard role for 24R3

Safety Administration

- Updated training for new Safety Settings (Full Site Information Reporter Type, Study Type of Reaction, Medical Confirmation), E2B Updates (Source and Method of Study Drug Assessment, Name NullFlavor), Study Drug Form Configuration (Study Drug Indication as static or mapped), New Reporter/Sender Comments by System Form

Local Labs

- Course updated to include the ability to Hide Analytes

CDB

Identical Item Listing Builder Feature

- CDB Listing Builder and Listing Builder in Clinical Reporting courses updated with new feature that differentiates between identical item names when building a listing

Values Selector Feature

- Query Workflow and Working with Listings in Clinical Reporting courses updated with new Values Selector features for Query Listings

April 2024

Curricular Changes

- New curricula without Local Labs: Data Entry (No Local Labs), Data Entry and Sign (No Local Labs), Data Manager (No Local Labs), Lead Data Manager (No Local Labs)

EDC and CDMS

Coder Tools

- New training for Batch Assign Synonym and Do Not Autocode Lists and updated training for new Unique Terms Report features (Optional end date, Form and File Type Selection)

Freezing and Locking Data by Subject & Source Data Verification and Data Management Review Courses

- Updated training to show new filterable Subject Status column as well as hoverable SDV and DMR info icon

Protocol Deviations

- New training for Change Reason when Editing/Reviewing

Queries in Vault EDC

- Updated training to include queries on read-only/derived items and collapsible queries

Safety Administration

- New training for updated settings: Datetime Value Behavior (both E2B and Vault Safety-EDC Connection), Action Taken with Study Drug Behavior (E2B only), Local Labs SAE Date Range (Vault Safety-EDC Connection only)

User Management

- Now shows configuration of the connection between Vault CDMS and CDMS Vault Training

Vault CDMS Library

- Copying a Form from another Study or Library now includes Safety Integration configurations

Continued →

April 2024

CDB

Veeva CDB Overview, Navigating Clinical Reporting, Working with Listings in Clinical Reporting

- Updated courses with 100 rows per listing page, Expand/Collapse Grid, Reset listing definition button

Clean Patient Tracker

- Updated training to include new tracker columns (Incomplete Reviews, Overdue Forms and In-Progress Log Forms) and downloadable Event and Form Progress reports

Data Import for Vendors

- New training featuring query management for Data Providers

Data Ingestion for Data Managers

- New training for EDC incremental imports and updated third-party data source organization

April 2024

Curricular Changes

- New Data Loader curriculum containing Vault EDC Overview and new Data Loader course
- New View Data Loader Import History curriculum containing new View Data Loader Import History Course
- New EDC Clinical Reporting curriculum containing Navigating Clinical Reporting, Working with Listings in Clinical Reporting, Listing Builder in Clinical Reporting, and Monitoring Imports and Exports in Clinical Reporting
- New EDC Clinical Reporting Administration curriculum containing Listing Configuration and Administrative Reporting in Clinical Reporting
- New CDB Administrator curriculum containing new CDB Administration and CDB Configurations courses

EDC and CDMS

Visit Method

- Courses updated to include Visit Method: All in One: Vault CDMS for Principal Investigators, Data Entry in Vault EDC, Freezing and Locking Data by Subject, Providing an eSignature, Queries in Vault EDC, Source Data Verification and Data Management Review

Coding in Vault CDMS

- Updated training to include Remapping on Dictionary upversion

Coder Queries and Notes

- Updated training to include Autoclose Query when Coded or Autocoded setting

Coder Tools

- Updated training to include Autoclose Query when Coded or Autocoded, Importing Synonym List Validations, Remapping on Dictionary upversion

Queries in Vault EDC

- Updated training to include changes to Event-level queries

Vault Owner Overview

- Walks through new Clinical Reporting and Data Loader tabs

Local Labs

- Updated training to reflect that Analytes, Codelists and Units can now be archived instead of deleted

Continued →

April 2024

EDC and CDMS

EDC Tools

- New training for exporting site grid

User Management

- New training for adding site address and exporting site grid

Safety Administration

- New training for Vault Safety-EDC Connection and its related features (Vault Safety Fields in Form Configuration, Static Values, Paired Values)

CDB

CDB Listing Builder

- Now includes a listing quickly using the Item Search and easily share listings using Copy To... feature

Working with Listings

- Now includes Comparison Filters to compare data from two listing columns and steps to save listing CQL by Downloading Listing Definition

December 2023

Curricular Changes

- New CDB Listing Builder course and Listing Builder curriculum

Global Updates

Glossaries

- Glossaries added to all courses

EDC and CDMS

Optional Hands-on Practice

- Users can practice newly learned skills in the following courses: EDC Overview, Data Entry in Vault EDC, Providing an eSignature, Queries in Vault EDC

Data Entry in Vault EDC

- Updated training to reflect new method for marking a form Intentionally Left Blank

Safety Administration

- New training for Safety Settings Move to Studio and additional Safety Configurations

Local Labs

- Streamlined overall content, updated training to include Importing Units and Codelists in Bulk and Pending Lab Locations workflow

Local Labs for Sites

- Updated training for Mark as Blank

August 2023

Curricular Changes

- Snapshots added to LDM and DM curricula
- Snapshots - Read Only added to Auditor and Read Only curricula
- Clean Patient Tracker, Masking and Conditional Unblinding, and Deployments added to Veeva CDB curriculum
- Local Labs removed from CRA curriculum

Global Updates

Updated Quiz Settings for All Courses

- Users must answer 2 out of 3 questions correctly to pass
- Allows users to complete required training without requiring 100% to pass

EDC and CDMS

Vault EDC Overview

- Improved training on navigating and screen resolution

Data Entry in Vault EDC

- Improved training on navigating, screen resolution, audit trail, tracking progress

Freezing and Locking Data by Subject

- New course name and streamlined content

Queries in Vault EDC and Providing an eSignature

- Improved training on tracking progress

Safety Administration

- New training for Follow-up Processing options, Study Drug Blinding Property, Expanded safety report

EDC Tools

- Streamlined overall content and removed training for Integration Configurations

Coder Tools

- New training added for study setting – Grouping Criteria for Verbatims in All Caps

CDB

CDB Manifest Builder

- New course name and now includes checkbox for Open EDC support

Clone from Study

- Updated training for navigating to clone property

April 2023

Curricular Changes

- New condensed Principal Investigator course
- Managing Jobs on the Review Tab course added to CRA and DM curricula
- Coder Approval Workflow added to Coder Administrator curriculum
- Automated Data Checks, Configuring Course Listings, and Clone from Study added to Veeva CDB curriculum

Global Updates

- Quiz questions reduced from 5 to 2, randomly selected from a question bank
- Ability to adjust playback speed of courses

EDC and CDMS

Data Entry in Vault EDC

Screenshots and training updated for Submit button functionality, disable manual casebook creation

Exporting PDFs

New training added for hover messages for Closeout PDFs

Local Labs

New training added for language translations

EDC Tools and Coder Tools

Screenshots and training updated to reflect user interface changes

User Management

New training added for User Access Report

Course Names Updated

- Clinical Assessments → Medical Assessments
- Safety Administration in Studio → Safety Administration

Continued →

April 2023

CDB

Veeva CDB Overview

- New training added for navigation features - search for study/listings, last listing visited link and marking as favorites

Course Names Updated

- Veeva CDB Accessing Workbench & Basic Navigation → Veeva CDB Overview
- Veeva CDB Working with Data Listings → Working with Listings
- Veeva CDB Query Workflow → Query Workflow
- Veeva CDB Review Listings → Review Listings
- Veeva CDB Data Ingestion for Data Managers → Data Ingestion for Data Managers
- Veeva CDB Import Manifest Builder → Import Manifest Builder
- Veeva CDB Training Exercise Module → CDB Hands-on Activity

December 2022

Curricular Changes

- New Data Entry, Queries and Signature, Coder Manager, and Protocol Deviations curricula

Global Updates

- Users can now optionally see the correct answer for questions answered incorrectly

EDC and CDMS

Providing an eSignature

- New training added for bulk signature, signing with open queries, and signature history

Protocol Deviations

- New training added for new column (ID), new export option (CSV), and new behavior for inactive protocol deviations

Local Labs

- New training added for lab modifiers and inconclusive flag and new section added for System General Settings and Study General Settings

Source Data Verification & Data Management Review

- New training added for using Other, Specify functionality with Additive Review reasons

Coding courses

- Screenshots and training updated to reflect user interface changes and new training added describing how to continue coding when upversioning failed or when synonym list is missing

Reduced Training Time

- The following curricula have been reduced in time:
 - Principal Investigator: 60 minutes → 35 minutes
 - Data Entry and Sign: 60 minutes → 35 minutes
 - Review Data and Sign: 25 minutes → 15 minutes
 - Clinical Research Coordinator: 50 minutes → 30 minutes
 - Data Entry: 50 minutes → 30 minutes
 - Auditor: 30 minutes → 20 minutes
 - Read Only: 30 minutes → 20 minutes

Continued →

December 2022

EDC and CDMS

Content from retired courses Data Entry Basics and Advanced Data Entry merged into new course Data Entry in Vault EDC

- Users who completed Data Entry Basics and Advanced Data Entry do not need to complete Data Entry in Vault EDC

Content from retired courses Answering Queries and Managing Queries merged into new course Queries in Vault EDC

- Users who completed Answering Queries and Managing Queries do not need to complete Queries in Vault EDC

Content from retired courses Vault EDC Source Data Verification and Vault EDC Data Management Review merged into new course Source Data Verification and Data Management Review

- Users who completed Vault EDC Source Data Verification and Vault EDC Data Management Review do not need to complete Source Data Verification and Data Management Review

Content from retired course Vault EDC Running Ad Hoc Jobs integrated into existing course EDC Tools, resulting in EDC Tools being newly assigned to some roles (e.g. CRA)

- Users who completed Vault EDC Running Ad Hoc Jobs and their role has not changed since November 2021 do not need to complete EDC Tools. Users who completed Vault EDC Running Ad Hoc Jobs and their role has changed since November 2021 do need to complete EDC Tools

Site-specific content from course Local Labs Module was split out to create new course Local Labs for Sites

- Users who completed Local Labs Module do not need to complete Local Labs for Sites.

All role Exam courses were retired. Quizzes were added to each individual course.

Protocol Deviations is a new course, with no previous version.

- All users who are assigned this course need to complete it.

Coder Approval Workflow is a new course, with no previous version.

- All users who are assigned this course need to complete it.

Veeva CDB Data Ingestion for Data Managers is a new course, with no previous version.

- All users who are assigned this course need to complete it.

August 2022

Curricular Changes

- New Korean and Simplified Chinese translations for Data Entry and Sign, Review Data and Sign, and Data Entry curricula
- EDC Tools removed from CRA and DM curricula

Global Updates

- Audio narration added to most courses in the library
- Shortened transitions and animations, removed redundant content to reduce overall training time

EDC and CDMS

Vault EDC Overview

- New training added for MyTraining tab

Data Entry in Vault EDC

- Screenshots updated to reflect minor user interface changes and removed redundant training to shorten course length

EDC Tools

- Screenshots updated to reflect new user interface and new training added for Study Settings tab

Local Labs

- New training added for Global Versionless Local Labs

Vault CDMS User Management

- Screenshots updated to reflect new user interface in EDC Tools, new training added for enabling LMS feature in EDC Tools, new training added for new options when adding users

Vault EDC Clinical Assessments

- New training added for reassessments

April 2022

EDC and CDMS

Data Entry in Vault EDC

- New training added for Item to Form Linking and updates made to Form to Form Linking

Source Data Verification and Data Management Review

- New training added for Additive Review

Coder Tools

- New training added for Unique Terms Report

Local Labs

- Updates made to Lab Locations training (Initiated by study/Initiated by Site fields and columns)

Vault CDB Data Import for Vendors

- Minor updates, no new functionality

Vault CDB Import Manifest Builder

- New course with no previous version