

Veeva Vault

Vault V17R1 Release Impact Assessment

The Release Impact Assessment (RIA) documents the new capabilities introduced in Vault V17R1 that may affect a customer's validation efforts. We release a version of the RIA in advance of the general release. Closer to the general release date, an updated version is released, detailing validation information. As indicated, most new features are off by default and must be configured. Any feature that is not automatically available has a Default Impact value of "None," since there is no user impact unless an Admin takes specific action.

Revision Date: April 19th, 2017

This feature list is subject to change prior to the V17R1 release. Please note the revision date and the change log on the last sheet.

Feature:	Name of the feature introduced in V17R1
Enablement:	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 some Auto-On features do require individual users (not Admins) to complete some set up, for example, new Reporting capabilities generally require a user to create a new report or edit an existing one.
Feature Risk	Feature 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 feature 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>Med</i> May affect core application functions (workflows, revision history, etc.)
	<i>Low</i> May affect metadata/notifications
Default Impact	Impact to business users and processes at Day 1 if no configuration occurs

Application	Feature Name	Enablement	Feature Risk	Default Impact	BRD	BRD Requirement(s)	OQ Test	Trace Matrix	Comment
eTMF									
eTMF	Lifecycles for Study, Study Country, and Site Objects	Configuration	Med	None	Vault BRD: electronic Trial Master File (eTMF) (QV-05878)	TMF-03-007 TMF-04-011	Vault-OQ-TMF-03 (QV-05860)	Vault Traceability Matrix: electronic Trial Master File (eTMF) (QV-05878)	Object lifecycles are now available for Study, Study Country and Study Site objects.
eTMF, Study Startup	Copy Field to Related Object Entry Action	Configuration	Med	None	Vault BRD: electronic Trial Master File (eTMF) (QV-05878)	TMF-36-001	Vault-OQ-TMF-04 (QV-01890)	Vault Traceability Matrix: electronic Trial Master File (eTMF) (QV-05878)	The Copy Specific Fields to Related Record object lifecycle state entry action copies the value of a date, number, or text field from the current object record to a field on a related object record.
Study Startup	Milestone Gating	Configuration	Med	None	Vault BRD: Study Startup (QV-05898)	SSU-09-001 SSU-09-002 SSU-09-003 SSU-09-004	Vault-OQ-SSU-09 (QV-08173)	Vault Traceability Matrix: Study Startup (QV-05898)	Milestone gating can ensure that Study Startup users progress through their milestones in a specific order, leveraging the Milestones lifecycle, its Done state, and the Finish to Finish object type within Milestone Dependencies.
Study Startup	Milestone Rollups	Auto-On	Low	Low	Vault BRD: Study Startup (QV-05898)	SSU-09-005 SSU-09-006 SSU-09-007 SSU-09-008 SSU-09-009 SSU-09-010 SSU-09-011 SSU-09-012 SSU-09-013	Vault-OQ-SSU-09 (QV-08173)	Vault Traceability Matrix: Study Startup (QV-05898)	Milestone Rollups enable teams to calculate a milestone's forecast and actual dates based on "rollup" type milestone dependencies.
eTMF, Study Startup & QualityDocs	Export with Overlays & Signature Pages: Enablement Change	Auto-On	Low	Low	N/A	N/A	N/A	N/A	The existing Export with Overlays & Signature Pages setting for binder export is now on for all eTMF, Study Startup, and QualityDocs vaults.
RIM									
RIM	Additional eCTD Schema Support	Auto-On	Med	Med	Vault BRD: Submissions Archive (QV-05900)	SA-03-025	Vault-OQ-SA-03A (QV-06344)	Vault Traceability Matrix: Submissions Archive (QV-05900)	SubmissionsArchive users can now import JP XSD 1.0 schema. (RIM SubmissionsArchive)
RIM	Packaging-Level Registrations	Auto-On	Med	Med	Vault BRD: Registrations (QV-05902)	REG-05-008 REG-05-009 REG-05-010 REG-05-011	Vault-OQ-REG-05 (QV-06343)	Vault Traceability Matrix: Registrations (QV-05902)	The bulk creation process for registrations now accommodates country-specific variations in how licenses are granted. Users can create Registration records at the pack-size level when applicable. Packaging records in the bulk object record creation wizard are pulled from the packaging product detail relationship. (RIM Registrations)
RIM	Enhanced Export to Excel for Tree View	Auto-On*	Med	Med	Vault BRD: Vault Objects (QV-05890)	VOF-15-011	Vault-OQ-VOF-15 (QV-07618)	Vault Traceability Matrix: Vault Objects (QV-05890)	When performing a Hierarchical Export to Excel from the Tree View, the export includes any documents that were matched to the Content Plan Items within the exported view. (Submissions) *This feature is Auto-On in vaults using Submission Content Planning.
RIM	Cascade Review & Approval for Binder Content	Configuration	Med	None	Vault BRD: RIM Submissions (QV-05888)	RSUB-10-001 RSUB-10-002 RSUB-10-003 RSUB-10-004 RSUB-10-005 RSUB-10-006 RSUB-10-007 RSUB-10-008 RSUB-10-009 RSUB-10-008 RSUB-10-009 RSUB-10-010 RSUB-10-011 RSUB-10-012 RSUB-10-013 RSUB-10-014 RSUB-10-015 RSUB-10-016 RSUB-10-017 RSUB-10-018 RSUB-10-019 RSUB-10-020	Vault-OQ-RSUB-10 (QV-08134)	Vault Traceability Matrix: RIM Submissions (QV-05888)	There are new entry actions available on document lifecycles (applied to binders) that can change state or set version binding on binder content. (RIM Submissions)
RIM	Content Plan Matching Rules	Configuration*	Med	None	Vault BRD: RIM Submissions (QV-05888)	RSUB-09-022 RSUB-09-023 RSUB-09-024 RSUB-09-025 RSUB-09-026 RSUB-09-027 RSUB-09-028 RSUB-09-029 RSUB-09-030 RSUB-09-031	Vault-OQ-RSUB-09 (QV-07634)	Vault Traceability Matrix: RIM Submissions (QV-05888)	Admins can configure matching rules for Submission Content Planning, providing the ability to automatically match documents with content plan items. Content matching recognizes when a document is already used in another content plan/submission that is part of the same application and avoids repeating documents across submissions. Vault populates the fields used for matching as part of the content plan creation process. *This feature is available in vaults where Submission Content Planning is enabled. You must contact Veeva Support to enable Submission Content Planning. (RIM Submissions)
RIM	Enhancements to Submission Content Planning	Configuration*	Med	None	Vault BRD: RIM Submissions (QV-05888)	RSUB-09-018 RSUB-09-019 RSUB-09-020 RSUB-09-021	Vault-OQ-RSUB-09 (QV-07634)	Vault Traceability Matrix: RIM Submissions (QV-05888)	Numerous enhancements have been added to Submission Content Planning to reduce the number of Content Plan Templates to be created and to provide more context to the end user. *This enhancement is available in vaults where Submission Content Planning is enabled. You must contact Veeva Support to enable Submission Content Planning. (RIM Submissions)
RIM	XML Package Rendering	Auto-On*	Low	Low	Vault BRD: Working with Documents (QV-05896)	DOC-01-027	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Working with Documents (QV-05896)	Vault can render ZIPs containing XML with valid HTML transformations (XSL/XSLT). This builds on the existing Structured Product Labeling (SPL) rendition functionality. (RIM Submissions) *This feature is Auto-On in vaults using SPL rendering.

PromoMats

Application	Feature Name	Enablement	Feature Risk	Default Impact	BRD	BRD Requirement(s)	OQ Test	Trace Matrix	Comment
PromoMats	Unclassified Document Creation Through FTP	Support	Med	None	Vault BRD: Working with Documents (QV-05896)	DOC-01-028 DOC-01-029 DOC-01-030 DOC-01-031 DOC-01-032 DOC-01-033 DOC-01-034 DOC-01-035 DOC-08-009	Vault-OQ-DOC-01C (QV-08137)	Vault Traceability Matrix: Working with Documents (QV-05896)	Users can upload files up to 100GB using the "Inbox" directory on their vault's FTP server. Vault monitors this folder and automatically creates unclassified documents.
PromoMats	Batch Approval: Enablement Change	Auto-On	Low	Low	N/A	N/A	N/A	N/A	In this release, Batch Approval is automatically enabled for all PromoMats vaults.
PromoMats	Extract Image, Audio & Video Properties	Auto-On	Low	Low	Vault BRD: Working with Documents (QV-05896) Vault BRD: Commercial Applications (QV-05870)	DOC-20-008 DOC-22-001 COM-16-001	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Working with Documents (QV-05896) Vault Traceability Matrix: Commercial Applications (QV-05870)	Vault extracts EXIF, XMP and IPTC metadata from uploaded images, audio, and video files. Vault displays the details in the File Info section within the Doc Info page.
PromoMats	RAW Camera File Support	Auto-On	Low	Low	Vault BRD: Commercial Applications (QV-05870)	COM-17-002	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Commercial Applications (QV-05870)	Vault now creates viewable renditions for several RAW camera file types.
Multichannel									
Multichannel	Set Presentations & Slides to Obsolete	Configuration*	Med	None	Vault BRD: Commercial Applications (QV-05870)	COM-09-055 COM-09-056 COM-09-057 COM-09-058	Vault-OQ-COM-09A (QV-02907)	Vault Traceability Matrix: Commercial Applications (QV-05870)	This feature adds two new user actions, "Obsolete related presentations and slides" and "Obsolete dropped slides", which can move multichannel slides to their Obsolete state. *This feature is Auto-On in vaults using the Create Presentation user action.
Multichannel	Multichannel Shared Fields	Auto-On	Low	Low	Vault BRD: Commercial Applications (QV-05870)	COM-09-054	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Commercial Applications (QV-05870)	This feature converts all Multichannel document fields to shared fields.
Multichannel	Retain PowerPoint as Source for Multichannel Slides	Auto-On*	Low	Low	Vault BRD: Commercial Applications (QV-05870)	COM-09-052 COM-09-053	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Commercial Applications (QV-05870)	Users can choose to retain the PowerPoint source file when using the Create Presentation action. *This feature is Auto-On in vaults that use the Create Presentation user action.
Multichannel	Litmus Integration for Approved Email	Configuration	Low	None	Vault BRD: Commercial Applications (QV-05870)	COM-06-027 COM-06-028 COM-06-029	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Commercial Applications (QV-05870)	Users can preview Approved Email content as it would appear on most common email clients, browsers, and devices.
GMS									
GMS	Long Text Fields	Support	Med	None	Vault BRD: Vault Objects (QV-05890)	VOF-02-034 VOF-02-035 VOF-02-036 VOF-02-037 VOF-02-038	Vault-OQ-VOF-02C (QV-08135)	Vault Traceability Matrix: Vault Objects (QV-05890)	Long Text type fields allow users to enter text strings up to 32,000 characters. In the current release, this field type is only available through standard application fields in new GMS vaults.
All									
All	Forgot User Name	Auto-On	High	High	Vault BRD: Compliance (QV-05872)	CMP-39	Vault-OQ-CMP-39 (QV-08128)	Vault Traceability Matrix: Compliance (QV-05872)	Users who have forgotten their Vault user name have a self-service option for retrieving it.
All	Improved My Vaults Page with Cross-Domain Support	Auto-On	High	High	Vault BRD: Workflow	WF-13-003 WF-13-004 WF-13-006 WF-13-007 WF-13-008 WF-13-009 WF-13-010 WF-13-011 WF-13-012 WF-13-013 WF-13-014	Vault-OQ-WF-13 (QV-01867)	Vault Traceability Matrix: Compliance (QV-05872)	The My Vaults page supports access to vaults across multiple domains, sorting/filtering, and marking vaults as favorites. Each vault tile shows domain name, last accessed time, and application.
All	Improved Vault Selector with Cross-Domain Support	Auto-On	High	High	Vault BRD: Compliance (QV-05872)	CMP-41	Vault-OQ-CMP-41 (QV-08130)	Vault Traceability Matrix: Compliance (QV-05872)	Users with access to more than ten (10) vaults see a vault selector with type-ahead search and that lists the five (5) most recently accessed vaults. Remote domain vaults show their domain name.
All	Password Reset Changes	Auto-On	High	High	Vault BRD: Compliance (QV-05872)	CMP-02	Vault-OQ-CMP-02 (QV-01721)	Vault Traceability Matrix: Compliance (QV-05872)	When users request a password reminder, they now receive an email with reset instructions and a link to enter a new password. Unless users take action to set the new password, their original password remains unchanged.

Application	Feature Name	Enablement	Feature Risk	Default Impact	BRD	BRD Requirement(s)	OQ Test	Trace Matrix	Comment
All	Cross-Domain Users & Authentication	Configuration	High	None	Vault BRD: Compliance (QV-05872)	CMP-06-007 CMP-06-008 CMP-08-002 CMP-08-010 CMP-10-003 CMP-11-001 CMP-11-002 CMP-11-003 CMP-11-007 CMP-11-008 CMP-11-013 CMP-11-015 CMP-11-016 CMP-11-017 CMP-11-018 CMP-11-019 CMP-11-020 CMP-11-021 CMP-11-022 CMP-11-023 CMP-20-011 CMP-23-001	Vault-OQ-CMP-11A (QV-01754) Vault OQ-CMP-11B (QV-08127)	Vault Traceability Matrix: Compliance (QV-05872)	Admins can add existing (home domain) users to remote domains as "as cross-domain users." These users can access vaults on remote domains, if granted access, using their existing login credentials/SSO policy.
All	Field-Level Security on Objects	Configuration	High	None	Vault BRD: Compliance (QV-05872)	CMP-42	Vault-OQ-CMP-42 (QV-08131)	Vault Traceability Matrix: Compliance (QV-05872)	Admins can control Read and Edit permissions on individual fields within an object, making certain fields hidden or read-only to users with specific security profiles.
All	Object Record Access Control by Lifecycle State	Configuration	High	None	Vault BRD: Lifecycles (QV-05882)	LC-13-017 LC-13-018 LC-13-019	Vault-OQ-LC-13C (QV-08133)	Vault Traceability Matrix: Lifecycles (QV-05882)	Custom roles with editable permissions functionality has moved to the object lifecycle level, as well as the Owner role. Permissions are editable at the state level.
All	Cancelling Object Workflows Reverts Record to Original State	Auto-On	Low	Low	N/A	N/A	N/A	N/A	Cancelling a workflow reverts the object record to the state it was in when the workflow started.
All	Component Comparison for Configuration Packages	Auto-On	Med	Med	Vault BRD: Configuration Migration (QV-07644)	MIG-06-008	Vault-OQ-MIG-06 (QV-07606)	Vault Traceability Matrix: Configuration Migration (QV-07644)	This feature compares the component included in an inbound package with the same component as currently configured on the target vault.
All	Configuration Migration Package Comparison Export	Auto-On	Low	Low	Vault BRD: Configuration Migration (QV-07644)	MIG-05-006	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Configuration Migration (QV-07644)	Users can export an Excel workbook that describes the differences between an inbound package and the current vault configuration.
All	Vault Loader Field Selector	Auto-On	Med	Med	Vault BRD: Working with Documents (QV-05896)	DOC-19-041	Vault-OQ-DOC-19 (QV-04827)	Vault Traceability Matrix: Working with Documents (QV-05896)	Users can now specify exactly which fields to include in the output for a Vault Loader extract when extracting Documents, Document Versions, Users, and Objects.
All	Merge Fields in Protected Sections	Auto-On*	Med	Med	Vault BRD: Working with Documents (QV-05896)	DOC-01-036	Vault-OQ-DOC-01C (QV-08137)	Vault Traceability Matrix: Working with Documents (QV-05896)	In MS Word documents that use the Merge Fields feature, users can now include tokens within protected sections. Vault replaces the tokens with the correct field values, but preserves the editing restrictions in the source file. *This feature is Auto-On in vaults using Merge Fields.
All	Merge Fields: Row Repeaters	Auto-On*	Med	Med	Vault BRD: Working with Documents (QV-05896)	DOC-01-035	Vault-OQ-DOC-01C (QV-08137)	Vault Traceability Matrix: Working with Documents (QV-05896)	In Microsoft Word documents that use the Merge Fields feature, users can include tokens for multi-value fields within a table row to dynamically create rows for each item in the list. Tokens for related object fields resolve in the same rows. *This feature is Auto-On in vaults using Merge Fields.
All	Calculated Task Due Date in Object Workflows	Configuration	Med	None	Vault BRD: Workflows (QV-05892)	WF-21-021	Vault-OQ-WF-21A (QV-06904)	Vault Traceability Matrix: Workflows (QV-05892)	Admins can configure object workflow task due dates based on a number of days offset from either Workflow Start Date or Task Creation Date.
All	Hide User Information	Configuration	Med	None	Vault BRD: Compliance (QV-05872)	CMP-40	Vault-OQ-CMP-40 (QV-08129)	Vault Traceability Matrix: Compliance (QV-05872)	Admins can hide identifying user information from a specific group of users by configuring a custom security profile and permission set without the new View User Information permission. Information is hidden from users who do not share their email address domain.
All	Manage Multiple Applications within a Vault	Configuration	Med	None	Vault BRD: Compliance (QV-05872)	CMP-08-015 CMP-11-024	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Compliance (QV-05872)	Vaults can now use multiple applications from a suite, rather than a single application. These vaults must have separate licenses for each application.
All	Object State Entry Action Change State of Related Records' States	Configuration	Med	None	Vault BRD: Lifecycles (QV-05882)	LC-13-016	Vault-OQ-LC-13C (QV-08133)	Vault Traceability Matrix: Lifecycles (QV-05882)	Admins can configure entry actions to change the lifecycle state of a related record.
All	Object State Entry Criteria Based on Related Object Records' States	Configuration	Med	None	Vault BRD: Lifecycles (QV-05882)	LC-13-015	Vault-OQ-LC-13C (QV-08133)	Vault Traceability Matrix: Lifecycles (QV-05882)	Admins can configure lifecycle state entry criteria to verify that related object records are in a specified state.
All	Update Record Fields Workflow Step & Entry Action	Configuration	Med	None	NA	N/A	N/A	N/A	Admins can configure a workflow step or entry action to set the value of an object record field as part of a workflow or state change. This release adds support for setting picklist and yes/no fields.
All	Document Version Locking	Support*	Med	None	Vault BRD: Vault Objects (QV-05890)	VOF-12-024 VOF-12-025	Vault-OQ-VOF-12B (QV-08136)	Vault Traceability Matrix: Vault Objects (QV-05890)	Users can lock the relationship between an EDL Item record and a specific Steady State version of a document. Once the version is locked, Vault does not automatically update the match relationship when new versions of the document enter their lifecycle's Steady State. *This feature is not available for eTMF.
All	Manual Add/Remove Document Options	Support*	Med	None	Vault BRD: Vault Objects (QV-05890)	VOF-12-020 VOF-12-021 VOF-12-022 VOF-12-023	Vault-OQ-VOF-12B (QV-08136)	Vault Traceability Matrix: Vault Objects (QV-05890)	Users can manually adjust which documents match a specific EDL item by manually adding or removing them from the EDL Item record. *This feature is not available for eTMF.
All	ASF Video Support	Auto-On	Low	Low	Vault BRD: Working with Documents (QV-05896)	DOC-20-006	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Working with Documents (QV-05896)	Vault can now render and display ASF format video files.

Application	Feature Name	Enablement	Feature Risk	Default Impact	BRD	BRD Requirement(s)	OQ Test	Trace Matrix	Comment
All	Audio File (MP3) Support	Auto-On	Low	Low	Vault BRD: Working with Documents (QV-05896)	DOC-19-040 DOC-20-007 DOC-22-001 DOC-22-002	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Working with Documents (QV-05896)	Users can upload several audio file types, and Vault will create playable MP3 renditions. Vault uses the album art as the document thumbnail.
All	Auto-Populated Rendition Detail Fields	Auto-On	Low	Low	N/A	N/A	N/A	N/A	All renditions types now include auto-populated fields to provide information about them: File Size and Uploaded On.
All	Cart: Enablement Change	Auto-On	Low	Low	N/A	N/A	N/A	N/A	In this release, Cart is automatically enabled for all vaults.
All	Combined Create & Upload Button	Auto-On	Low	Low	N/A	N/A	N/A	N/A	This release consolidates the Upload and Create buttons into one unified Create button.
All	Component Label Visible in Outbound Packages	Auto-On	Low	Low	Vault BRD: Configuration Migration (QV-07644)	MIG-02-002	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Configuration Migration (QV-07644)	The component Label value is now visible in the Outbound Packages UI.
All	Document Reference Fields in Object Reports	Auto-On	Low	Low	Vault BRD: Reporting/Dashboard (QV-05886)	REP-01-032	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Reporting/Dashboard (QV-05886)	Users can include document reference fields (as columns, filters, and groupings) in their object reports.
All	Export Reports to PDF	Auto-On	Low	Low	Vault BRD: Reporting/Dashboard (QV-05886)	REP-03-004	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Reporting/Dashboard (QV-05886)	With this enhancement, users can export reports as a PDF with the optional, configurable Report Export Cover Page.
All	Gavel Icon for Legal Hold	Auto-On	Low	Low	N/A	N/A	N/A	N/A	Previously, Vault displayed a Gavel icon in the Library and on the Doc Info page when a document was under legal hold. With this release, the Gavel icon will only display in the Doc Info page and on the document's hovercard.
All	Increased Limits for Document Lookup Fields	Auto-On	Low	Low	N/A	N/A	N/A	N/A	We have increased the limits on Lookup type document fields to better meet the needs of customers.
All	Limit CSV File Size for Vault Loader	Auto-On	Low	Low	N/A	N/A	N/A	N/A	Vault Loader enforces a file size limit for uploaded CSV files: 10 MB. This limit improves performance.
All	Login Page UI Update	Auto-On	Low	Low	N/A	N/A	N/A	N/A	We've updated the login page. This enhancement does not change behavior.
All	Naming & Icon Change for Cart (formerly: My Collection)	Auto-On	Low	Low	Vault BRD: Working with Documents (QV-05896)	DOC-23	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Working with Documents (QV-05896)	We changed the name of the "My Collection" feature to "Cart." We updated all icons and labels from My Collection to Cart. Following the label and icon changes, we redesigned the Cart page to focus on download and bulk actions.
All	New Report Display Options	Auto-On	Low	Low	Vault BRD: Reporting/Dashboard (QV-05886)	REP-01-033	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Reporting/Dashboard (QV-05886)	Users can modify the labels of columns and filters in a report without making changes to the overall vault. In addition, users can remove the Name columns, which Vault previously required for every reporting object. *This feature is automatically available, but it will not change existing reports.
All	New Vault Color Palette	Auto-On	Low	Low	N/A	N/A	N/A	N/A	We have updated the page header color scheme throughout Vault to present a cleaner and more modern look. This change also affects the Admin area, the external document viewer, and the My Vaults page.
All	Object Reference Field Links in Related Object Lists	Auto-On	Low	Low	Vault BRD: Vault Objects (QV-05890)	VOF-03-043 VOF-03-044	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Vault Objects (QV-05890)	Within Related Object sections on an object record detail page, Vault displays object reference fields as clickable links.
All	Object Reference Links in Doc Info	Auto-On	Low	Low	Vault BRD: Working with Documents (QV-05896)	DOC-03-029	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Working with Documents (QV-05896)	When viewing the Doc Info page, users can click on an object reference and navigate to the detail page for that object record.
All	Preview Thumbnail in Video Player	Auto-On	Low	Low	Vault BRD: Working with Documents (QV-05896)	DOC-19-042	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Working with Documents (QV-05896)	The video player displays preview thumbnails of the video as users drag along the timeline. This is only available for newly uploaded or re-rendered videos.
All	Relabeling Filter Records in Referenced Object	Auto-On	Low	Low	N/A	N/A	N/A	N/A	"Filter Records in Referenced Object" has been relabeled to "Constrain Records in Referenced Object".
All	Reporting Supports Multiple "Down" Objects	Auto-On	Low	Low	Vault BRD: Reporting/Dashboard (QV-05886)	REP-07-003	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Reporting/Dashboard (QV-05886)	This enhancement allows users to include multiple "down" objects, such as documents and child objects, in a single report.
All	Rolodex Links Removed from Users Pages	Auto-On	Low	Low	N/A	N/A	N/A	N/A	In the Admin > Users & Groups > Security Profiles > Users tab, we've removed the rolodex links (alphabetical links) that appear above the user list.
All	Search-Based Document Type Selector: Enablement Change	Auto-On	Low	Low	N/A	N/A	N/A	N/A	Search-based document type selector is now Auto-On for all vaults.

Application	Feature Name	Enablement	Feature Risk	Default Impact	BRD	BRD Requirement(s)	OQ Test	Trace Matrix	Comment
All	User Mentions in Annotations	Auto-On	Low	Low	Vault BRD: Document Review (QV-05876)	REV-02-048 REV-02-049 REV-02-050 REV-02-051 REV-02-052 REV-02-053 REV-02-054 REV-02-055	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Document Review (QV-05876)	A user can "mention" another user in an annotation note or a reply and Vault notifies the mentioned user.
All	Vault Loader Extracts Name & External ID for Related Object Records	Auto-On	Low	Low	N/A	N/A	N/A	N/A	Vault Loader CSV extracts now identify object references using the external_id__v and name__v fields, rather than just the internal id field.
All	Video Player Upgrade	Auto-On	Low	Low	Vault BRD: Working with Documents (QV-05896)	DOC-20-001	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Working with Documents (QV-05896)	This upgrade increases stability, refreshes the interface, and adds a 10 second rewind option. The upgraded player does not require Adobe Flash to play, which provides broader device and browser compatibility. This upgrade re-enables seeking beyond the buffer.
All	Archived Document Reporting	Auto-On*	Low	Low	Vault BRD: Reporting/Dashboard (QV-05886)	REP-01-031	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Reporting/Dashboard (QV-05886)	Users can report on archived documents. *This feature is Auto-On in vaults using Document Archive.
All	Create & Relate Records from Document Fields	Auto-On*	Low	Low	Vault BRD: Working with Documents (QV-05896)	DOC-03-030	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Working with Documents (QV-05896)	A user editing a document can create a new object record from a document field without leaving the Doc Info page. *This feature is Auto-On in Vaults where Create & Relate Records from Records is enabled.
All	Case Change Functions	Configuration	Low	None	Vault BRD: Lifecycles (QV-05882)	LC-08-012	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Configuration Migration (QV-07644)	The "upper" and "lower" functions can change the text case when using the Set Field Using Formula state entry action for a document lifecycle, Update Record Field object lifecycle state entry action, and Update Record Field object workflow step.
All	Configuration Migration Packages: Enablement Change	Configuration	Low	None	N/A	N/A	N/A	N/A	Admins can enable Configuration Migration Packages from Admin > Settings > General Settings.
All	Custom Tabs by Object Type	Configuration	Low	None	Vault BRD: Vault Objects (QV-05890)	VOF-13-013	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Vault Objects (QV-05890)	Admins can create custom tabs that are specific to a single object type.
All	Dynamic Page Layouts	Configuration	Low	None	Vault BRD: Vault Objects (QV-05890)	VOF-09-005	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Vault Objects (QV-05890)	Admins can declare that some page sections are visible only during specific states of an object record's lifecycle.
All	Dynamic Reference Constraints	Configuration	Low	None	Vault BRD: Vault Objects (QV-05890)	VOF-02-040	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Vault Objects (QV-05890)	Admins can define a dynamic reference constraint on a reference field to restrict the records that can be selected by filtering based on the value of another field.
All	Integration with Microsoft Office Online: Enablement Change	Configuration	Low	None	N/A	N/A	N/A	N/A	Admins can enable integration with Microsoft Office Online in Admin > Settings > General.
All	Page Layouts by Object Type	Configuration	Low	None	Vault BRD: Vault Objects (QV-05890)	VOF-09-006 VOF-09-007	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Vault Objects (QV-05890)	Admins can configure separate page layouts for some or all object types within an object.
All	Parent Object Field Filters	Configuration	Low	None	Vault BRD: Vault Objects (QV-05890)	VOF-02-039	Requirement not traced to OQ script per risk classification. Please see Traceability Matrix for referenced SDLC Test Scripts.	Vault Traceability Matrix: Vault Objects (QV-05890)	Filters on Parent Object fields can constrain the list of object records that a user can choose when creating a child record or associating records in a many-to-many relationship.
All	Required Fields by Object Type	Configuration	Low	None	Vault BRD: Vault Objects (QV-05890)	VOF-13-011	Vault-OQ-VOF-13 (QV-06903)	Vault Traceability Matrix: Vault Objects (QV-05890)	Admins can configure some fields as required only for records of a particular object type.

Change Log

This feature list is subject to change prior to the V17R1 release. Please note the following changes:

Date	Changes	Impact
March 3 rd , 2017	Initial RIA published.	N/A
March 10 th , 2017	17.0.0 features released.	17.0.0 features are up to date in the RIA.
March 21 st , 2017	Updated the enablement of Document Version Locking and Manual Add/Remove Document Options. Removed Submission Content Planning: Enablement Change. This feature has been postponed to a later release.	RIA now includes up to date enablement and feature information.
March 22 nd , 2017	Updated the enablement of User Mentions in Annotations from Configuration to Auto-On. This feature will be Auto-On in all vaults for 17R1. Updated the default impact from Medium to None for Document Version Locking and Manual Add/Remove Document Options.	RIA now includes up to date enablement and default impact.
March 23 rd , 2017	Removed eTMF from Application for Milestone Gating and Milestone Rollups.	RIA now includes up to date application availability for features.
March 27 th , 2017	Added BRDs, BRD Requirements, OQ Tests, and Trace Matrices.	RIA now includes validation information.
April 4 th , 2017	Updated the OQ test for Component Comparison for Configuration Migration Packages to Vault-OQ-MIG-06.	RIA now includes up to date validation information.
April 18 th , 2017	Updated the Feature Risk and Default Impact of Cancelling Object Workflows Reverts Record to Original State and Configuration Migration Package Comparison Export from Medium to Low. Updated the OQ Test for Configuration Migration Package Comparison Export.	RIA now includes up to date validation information.
April 19 th , 2017	Updated the enablement for Unclassified Document Creation through FTP to Support.	RIA now includes up to date enablement information.