

Veeva Vault

Vault 17R3 Release Impact Assessment

The Release Impact Assessment (RIA) documents the new capabilities introduced in Vault 17R3 that may affect a customer's vault. We release a version of the RIA in advance of the general release. On November 6th, the Validation Impact Assessment, which contains validation information for new features in 17R3, will be available in your VeevaDocs vault. Refer to the Enablement and Default Impact for each feature to determine the visibility and configuration requirements.

Revision Date: December 4th, 2017

This feature list is subject to change prior to the 17R3 release. We will begin tracking changes on October 30th, 2017.

Feature:	Name of the feature introduced in 17R3
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>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:	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.
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

Application	Feature Name	Feature Risk	Enablement	Default Impact	Comment
Clinical Operations					
Clinical Operations	Task Templates	Medium	Configuration	Visible to Admins Only	An Admin can define groups of tasks to create from templates. Vault creates templated Clinical User Tasks when a user creates milestones using the associated Template Milestone Set.
Clinical Operations	Drag & Drop Upload for EDL Items	Low	Auto-On	Visible to All Users	Users can drag and drop single documents onto an <i>EDL Item</i> record to upload and automatically match the document to the <i>EDL Item</i> . *This feature is auto-on in Clinical vaults where Expected Document Lists are enabled.
Clinical Operations	Clinical User Task Option in the Create Menu (UI Enhancement)	N/A	Auto-On	Visible to All Users	Users can create a <i>Clinical User Task</i> record from the Create menu. *The <i>Clinical User Task</i> object was added to Clinical vaults in an earlier release.
CTMS	Trip Reports	High	Support	Visible to Admins Only	Users can answer questions and create a trip report document directly from the <i>Monitoring Event</i> object record.
eTMF, Study Startup	Promote eTMF & Study Startup Vaults to Clinical	Medium	Auto-On	Visible to All Users	This feature promotes eTMF and Study Startup application vaults to Vault Clinical Suite.
SiteExchange	SiteExchange User Privacy	High	Configuration	Visible to Admins Only	Site Users can now see identifying details for users whose email address domain matches the vault domain.
Study Startup	Site Feasibility	Medium	Support	None	Study Startup users can now manage Study Site identification, selection, and feasibility using the new Facilities Information and Credentials objects (and their new supporting picklists), new fields on the Person, Location, and Study Site objects, and new workflow and lifecycle configuration options.
PromoMats & MedComms					
PromoMats	Combined Device PDF	N/A	Configuration	Visible to Admins Only	When configured, users can select multiple devices to preview in a PDF using the Veeva Web2PDF web action.
PromoMats & MedComms	Brand Portal	Low	Support	None	Admins can create a Brand Portal with various document widgets to share brand-specific content with users in a single location.
Multichannel					
Multichannel	New Fields for the Events Management Integration	Low	Auto-On	Visible to All Users	This feature adds the new <i>CRM Content Channel</i> and <i>Audience</i> document picklist fields. *This feature is auto-on in vaults with the Events Management and CLM integrations enabled.
QualityDocs					
QualityDocs	Bulk Wizard Enablement for Controlled Copy	High	Configuration	Visible to Admins Only	Authorized users can request controlled copies for multiple documents using a bulk action. *This feature is available in vaults where Controlled Copies are enabled.
QualityDocs	MDCC: Cascade Document Roles	High	Configuration	Visible to Admins Only	Users can select a workflow participant group and assign those users to the Document Change Control Approver or Document Change Control Reviewer roles for all documents associated with the Document Change Control record. *While this feature requires configuration, it deploys new roles to document lifecycles and automatically grants specific permissions to these roles. The feature does not assign any users to the roles without configuration.
QualityDocs	Request Multiple Controlled Copies	High	Configuration	Visible to Admins Only	Users can request a specified number of copies of a single document when requesting controlled copies.
QualityDocs	Enhancements to Request Controlled Copies (UI Enhancement)	N/A	Auto-On	Visible to All Users	This update improves usability and readability for users requesting one or many controlled copies. *This feature is auto-on in vaults where controlled copies are enabled.
RIM					
RIM	RIM Data Model Harmonization	Medium	Auto-On	Visible to Admins Only	All RIM application vaults now include all RIM objects, fields, and picklists, regardless of which applications are enabled. This feature added the <i>Complex Drug Product</i> , <i>Simple Drug Product</i> , and <i>Product Component</i> objects for all of RIM.
RIM Registrations	RIM Registrations Data Model Updates	Low	Auto-On	Visible to Admins Only	This feature added the following objects for Registrations: <i>Submission Packaging</i> , <i>Event Drug Product</i> , <i>Event Active Substance</i> , <i>Event Inactive Ingredient</i> , <i>Event Indication</i> , and <i>Registered Drug Product</i> (replacing <i>Registered Product Detail</i>).
RIM Registrations	Bulk Create Registrations Wizard Updates	Medium	Configuration	Visible to Admins Only	The wizard now restricts records to those associated with the submission, supports creation of registrations for complex products, creates all of the registered joins based on Submission record metadata, enhances registered packaging joins, updates the logic for Centralised procedure, and supports Registration object types.
RIM Registrations	Dynamic Impact Assessment Reports	Medium	Configuration	Visible to Admins Only	The <i>Event Impact Assessment</i> report can now handle multiple variables based on the type of changed that is being planned.
RIM Registrations	Manage Registered Details Enhancements	Medium	Configuration	Visible to Admins Only	The Manage Registered Details wizard can now handle registered packaging records and automatically update the lifecycle state of these records.
RIM Submissions	Content Plan Enhancements: Process as System User	Medium	Auto-On	Visible to Admins Only	Vault generates content plans as <i>System</i> , instead of the user that triggered the action.
RIM Submissions	Content Plan Filtering	Medium	Configuration	Visible to Admins Only	Admins can apply constraints to their <i>Content Plan Templates</i> to exclude unnecessary content sections.
RIM Submissions Archive	Bulk Submission Export	Medium	Auto-On	Visible to All Users	Users can export <i>Submissions</i> in bulk from a report on <i>Applications</i> . *Users must create a report using the correct report type to access this feature.
RIM Submissions Archive	Submissions Archive EU & CA Draft DTD Support	Medium	Auto-On	Visible to All Users	Submissions Archive now supports the following draft DTD versions: CA 0.9, EU 0.90, EU 0.92, and EU 1.1.
RIM Submissions Archive	Submissions Archive Section-Level Cumulative View	Medium	Auto-On	Visible to All Users	Users can open a cumulative view of all historical leaf operation lifecycles on a <i>Submission</i> section.
RIM Submissions Archive	Correspondence in Submissions Archive Viewer	Medium	Configuration	Visible to Admins Only	Vault displays correspondence documents in the Submissions Archive Viewer.
RIM Submissions Archive	Submissions Archive Section Details	Medium	Configuration	Visible to Admins Only	Vault auto-populates the <i>Submissions Archive Document Section</i> field on <i>Content</i> documents upon <i>Submission</i> import.
RIM Submissions Archive	Package XML for Rendering	Low	Auto-On	Visible to All Users	Vault creates PDF viewable renditions for valid XML files upon Submission import.
EDC					
EDC	Changing an Event Date Prompts Reason for Change	High	Auto-On	Visible to All Users	Vault now prompts users to enter a reason for change when changing an <i>Event</i> date.
EDC	Default Permission Change for SDR	Medium	Auto-On	Visible to Admins Only	EDC standard security profiles no longer include permission to perform SDR by default.
EDC	Freeze & Lock all Forms in an Event	Medium	Auto-On	Visible to Admins Only	Users can now freeze and lock all <i>Items</i> in an <i>Event</i> .

EDC	Study Administration	Medium	Auto-On	Visible to Admins Only	Study managers can use the new Study Tools area to manage casebook versioning by <i>Study Site</i> .
EDC	System Rule Management in Studio	Medium	Auto-On	Visible to Admins Only	Clinical programmers can now edit system-generated rules in the Studio UI.
EDC	Detail PDFs	Medium	Auto-On	Visible to All Users	Users can export PDFs that include entered data, audit trail information, and queries.
EDC	Prevent Auto-Creation of Initial Repeating Form Record	Medium	Auto-On	Visible to All Users	Vault no longer automatically creates an initial repeating Form record upon Casebook creation.
EDC	Task Performance Enhancements	Medium	Auto-On	Visible to All Users	To improve performance, task counts only display in a listing page once a user selects a <i>Study</i> and automatically applies the <i>Study</i> filter.
EDC	Cross-Form & Cross-Event Data Validation Rules	Medium	Configuration	Visible to Admins Only	Clinical programmers can configure rules across multiple forms and events.
EDC	Dynamic Event Groups	Medium	Configuration	Visible to Admins Only	Clinical programmers can create rules to dynamically add <i>Event Groups</i> based on user-entered data.
EDC	Object Reuse in Studio	Medium	Configuration	Visible to Admins Only	Clinical programmers can reuse object definitions from other, published casebook definitions in their vault.
EDC	Queries on Events	Medium	Configuration	Visible to Admins Only	Monitoring users and Vault EDC can create queries on <i>Events</i> .
EDC	Skip Item (Dynamic Entry)	Medium	Configuration	Visible to Admins Only	Clinical programmers can configure rules to enable and disable <i>Items</i> based on user-entered data.
EDC	Targeted SDV	Medium	Configuration	Visible to Admins Only	Targeted SDV allows Admins to specify which <i>Items</i> require SDV and which do not.
EDC	timeDiff() Function for Data Validation Rules	Medium	Configuration	Visible to Admins Only	Clinical programmers can configure rules using the timeDiff() function.
EDC	Collapse & Expand Components in Design View	Low	Auto-On	Visible to Admins Only	Users can click to expand and collapse components in Studio's Design view.
EDC	Insert Identifiers into Rule Expressions	Low	Auto-On	Visible to Admins Only	Clinical programmers can use the Insert Identifier button to easily reference object definitions in rule expressions. This feature also relabels <i>Criteria</i> to <i>Expression</i> .
EDC	Search Object Definitions	Low	Auto-On	Visible to Admins Only	Clinical programmers can search in object definition tabs in Studio's Browse view.
EDC	Standard Report Templates & Report Types	Low	Auto-On	Visible to Admins Only	This feature adds standard report types and report templates to Vault EDC to track study operational metrics.
EDC	Study Versioning	Low	Auto-On	Visible to Admins Only	Admins can control and build new <i>Casebook Definition</i> versions for a <i>Study</i> .
EDC	Icon Badge for Queries	Low	Auto-On	Visible to All Users	Instead of a separate <i>Form</i> status icon for <i>Open Query</i> , Vault displays a query badge on the status icon.
EDC	Icon for Intentionally Left Blank Form	Low	Auto-On	Visible to All Users	Vault EDC displays a new icon for <i>Forms</i> that a user marked <i>Intentionally Left Blank</i> .
EDC	Links to Item Groups in Repeating Form Tables	Low	Auto-On	Visible to All Users	Repeating <i>Form</i> tables include links to their repeating <i>Item Groups</i> .
EDC	Reference Number for Repeating Forms	Low	Auto-On	Visible to All Users	Repeating <i>Forms</i> are assigned a reference number that displays in both form and table view. This number is now labeled as Reference # .
EDC	Removed Study Task Column from Study Listing Page	Low	Auto-On	Visible to All Users	The study listing page no longer displays a Study Task column for any users.
EDC	Required Items not Displayed with Yellow Background	Low	Auto-On	Visible to All Users	Required <i>Items</i> no longer display with a yellow background on forms.
EDC	Review Tasks Grouped in the Task Bar	Low	Auto-On	Visible to All Users	Review tasks display in a Review section of the task bar.
EDC	Sort the Casebook Schedule by Scheduled or Actual Date	Low	Auto-On	Visible to All Users	Users can toggle to sort the casebook schedule by scheduled or actual <i>Event Date</i> .
EDC	System-Generated Queries UI Update	Low	Auto-On	Visible to All Users	The Reply button on system-generated queries is now labeled Comment .
EDC	Updated Icons for Form Status	Low	Auto-On	Visible to All Users	This feature updated the status icons for <i>Forms</i> in the casebook schedule, carousel, and task bar.
Veeva Snap					
Veeva Snap	Veeva Snap	High	Auto-On	None	Vault users can use the mobile iOS application, Veeva Snap, to upload documents to their vault.
All					
All	eSignature Access for External Users	High	Auto-On	Visible to Admins Only	The standard <i>External User</i> security profile and permission set now include the Workflow > eSignature permission. Vault no longer generates license violation messages.
All	Google Chrome Blocks Saved Passwords in eSignature	High	Auto-On	Visible to All Users	Vault prevents Google Chrome from remembering passwords for eSignature.
All	ALS: Atomic Security for Actions	High	Configuration	Visible to Admins Only	Admins can secure object lifecycle user actions using role- or state-based atomic security.
All	ALS: Profile Security for Actions	High	Configuration	Visible to Admins Only	Admins can control whether Object Actions are hidden, viewed, or executed at the profile level. *Admins must contact Veeva Services to configure Object Actions.
All	ALS: Object Actions	High	Support	None	Object Actions are configured instances of a Vault Action for an object. *Admins must contact Veeva Services to configure Object Actions.
All	Register OAuth2/OIDC as Metadata in SSO Profile	High	Support	None	Admins can configure remote authorization server metadata to be discoverable.
All	Bulk Document Relationship via Loader	Medium	Auto-On	Visible to Admins Only	Users can create document relationships in bulk using Vault Loader. Users can use the <i>External ID</i> value to identify a source or target document.
All	Continuous EDL Matching	Medium	Auto-On	Visible to Admins Only	Continuous EDL matching queues documents for matching to EDL Items as soon as a user uploads or changes a document. *This feature is auto-on only in vaults where Expected Document Lists are enabled and batch matching is activated. Clinical: Note that this feature replaces the Motion Detector for Batch Update feature. At the release, the Batch Update field on all Active EDLs will be set to Yes. This feature is visible to all users in Clinical vaults.
All	New Support Component Types	Medium	Auto-On	Visible to Admins Only	Vault now supports the following component types for configuration migration: jobs, document matching rules, formatted outputs, rendition types, workflow participant rules, reports and dashboards, field layouts, and document relationship types.
All	Pass Context into Create & Relate	Medium	Auto-On	Visible to Admins Only	Vault auto-populates the parent object field when creating and relating an object record with a shared parent.
All	Upload Large Size Assets to Existing Documents	Medium	Auto-On	Visible to Admins Only	Users can upload <i>Large Sized Asset</i> renditions using the FTP Inbox.
All	Vault Loader Success & Failure Log Enhancements	Medium	Auto-On	Visible to Admins Only	Vault Loader now creates separate logs for successful and failed uploads.
All	Advanced Document Export	Medium	Auto-On	Visible to All Users	Users can export documents including source files, renditions, audit trails, and metadata CSV files. Users can also export multiple document and binder renditions at once.
All	Barcode Merge Fields	Medium	Auto-On	Visible to All Users	Merge Fields now supports the ability to represent Vault data as Code 39 extended barcodes in MS Word documents.
All	Document Linking Enhancements	Medium	Auto-On	Visible to All Users	Users can now create document links to either a whole document or anchors in the same document. Users can also see document links in View mode.

All	Improved Navigation for Embedded Links & Bookmarks	Medium	Auto-On	Visible to All Users	Links and bookmarks in Vault now direct users to a specific location within the document page, instead of the top of the page.
All	Inline Edit of Related Items	Medium	Auto-On	Visible to All Users	Users can now edit related object records inline.
All	Relationship Syntax for Merge Fields	Medium	Auto-On	Visible to All Users	Users can now include Merge Fields tokens for fields from related objects.
All	Document Lifecycle Entry Action to Change State of Related Object Records	Medium	Configuration	Visible to Admins Only	Admins can now configure a document lifecycle entry action to move a related object record to a certain lifecycle state, based on state type, when a document enters a lifecycle state.
All	Object Field Defaults	Medium	Configuration	Visible to Admins Only	Admins can define default values for an object field. This feature uses several new formula functions and operators.
All	Object Lifecycle Entry Action to Change State of Related Documents	Medium	Configuration	Visible to Admins Only	Admins can now configure an object lifecycle entry action to move a related document to a certain lifecycle state, based on state type, when an object record enters a lifecycle state.
All	Object Reference Constraints Enhancement	Medium	Configuration	Visible to Admins Only	Admins can configure dynamic reference constraints based on the object's lifecycle state.
All	System Managed Name Enhancements	Medium	Configuration	Visible to Admins Only	Admins can configure system-managed Name fields using tokens.
All	Vault Compare Permission	Medium	Configuration	Visible to Admins Only	Only users with the Vault Compare permission can access and run the Vault Compare report.
All	Vault Configuration Report	Medium	Configuration	Visible to Admins Only	Users can extract the configuration of a vault into an Excel report.
All	Workflow Task Due Dates Based on Object Fields	Medium	Configuration	Visible to Admins Only	Users can set workflow task due dates based on an object record date field.
All	Version-Specific Attachments & Auto Carry Forward	Medium	Support	None	When enabled, users can upload attachments to specific document versions. When configured, attachments can automatically carry forward across versions.
All	Create Document Relationships Bulk Action (UI)	Low	Auto-On	Visible to Admins Only	Users can create document relationships in bulk using a bulk action.
All	Document Usage Metrics	Low	Auto-On	Visible to Admins Only	The new Document Usage object automatically tracks documents and provides contextual information.
All	Bring Forward Annotations: Strict Options	Low	Auto-On	Visible to All Users	Users can choose whether to bring forward duplicate link annotations and page-level annotations.
All	Collapsible Page Sections	Low	Auto-On	Visible to All Users	Vault collapses all sections except the first section on an object record Details page.
All	Document Object Reference Links Based on Permissions	Low	Auto-On	Visible to All Users	Vault only renders an object reference as clickable link for users with permission to access the referenced records.
All	Filter Documents by Role	Low	Auto-On	Visible to All Users	Users can now filter documents by which users are assigned to a specific role.
All	Flash Report Preview	Low	Auto-On	Visible to All Users	Users can choose to include an HTML copy of a report in the Flash Report email.
All	Icon Selector for Saved Views	Low	Auto-On	Visible to All Users	Admins can select different icons for their saved views.
All	List Navigation for Related Items	Low	Auto-On	Visible to All Users	Users can now use the Tab key to navigate related object record lists.
All	Reorder Report Objects	Low	Auto-On	Visible to All Users	Users can reorder objects in reports with multiple "up" objects.
All	Video Annotations: Download Notes as Text File	Low	Auto-On	Visible to All Users	Users can download annotation notes on a video as a TXT file.
All	Configurable Cart Download Options	Low	Admin Checkbox	Visible to Admins Only	Admins can configure which types files are available for download from Cart, as well as the export file name.
All	Page Links	Low	Configuration	Visible to Admins Only	Admins can create page link URLs that direct users to custom object page destinations within Vault.
All	EDL Item with Matched Document Reports	Low	Configuration	Visible to All Users	Users can now report on EDL Items and their matched documents. *This feature is available in vaults where Expected Document Lists are enabled.
All	Update to Workflow Events in Timeline View (UI Enhancement)	N/A	Auto-On	Visible to All Users	Vault now updates the document version displayed with the workflow event in Timeline view and in the Workflow with Document report type.
All	Debug Log for Vault Java SDK	N/A	Auto-On	Visible to Admins Only	Admins can view details about programming errors and Vault Java SDK errors in the Debug Log.
All	Enablement Change: FTP Inbox	N/A	Auto-On	Visible to Admins Only	With this feature, the FTP Inbox is auto-on in all vaults.
All	Object Record Permission Details (UI Enhancement)	N/A	Auto-On	Visible to Admins Only	Admins can edit object permissions on the profile, field, and action level from the record permission Details page.
All	Vault Java SDK Permissions	N/A	Auto-On	Visible to Admins Only	This feature introduces 4 new permissions, Vault Java SDK > Read, Create, Edit, and Delete, to support Java SDK. Although the Java SDK is not yet available, these permissions display in your vault.

Change Log

This feature list is subject to change prior to the 17R3 release. We will begin tracking changes on Monday, October 30th.

Date	Changes	Impact
October 9 th , 2017	Initial RIA published.	N/A
November 1 st , 2017	Added the "Search Object Definitions" (EDC) feature to the RIA.	RIA now includes all features scheduled for release in 17R3.0.
November 2 nd , 2017	Updated the Feature Risk of "Object Reference Constraints Enhancement" from Low to Medium.	RIA now includes up to date feature risk information.
November 7 th , 2017	Removed the "Option to Disable Auto-Save on Forms" feature.	RIA now includes only features scheduled for release in 17R3.0.
November 7 th , 2017	Added a definition for the "N/A" feature risk.	RIA includes definitions for all possible feature risk values.
November 8 th , 2017	Added the "Standard Report Templates & Report Types" (EDC) feature.	RIA now includes all features scheduled for release in 17R3.0.
November 9 th , 2017	Updated the Feature Risk of "Manage Registered Details Enhancements," "Submissions Archive Section-Level Cumulative View," "Bulk Create Registrations Wizard Enhancements," and "Relationship Syntax for Merge Fields" from Low to Medium.	RIA now includes up to date feature risk information.
November 20 th , 2017	Added the "Enablement Change: FTP Inbox" feature and updated the enablement of "Upload Large Sized Assets to Existing Documents" from Support to Auto-On.	RIA now includes all features scheduled for release in 17R3.0 with up to date enablement information.
November 29 th , 2017	Updated the enablement of "Standard Report Templates & Report Types" (EDC) from Support to Auto-On.	RIA now includes up to date enablement information.
December 4 th , 2017	Updated the feature risk of "Submissions Archive EU & CA Draft DTD Support" from High to Medium.	RIA now includes up to date feature risk information.