Veeva Network

Veeva Network 22R2.1.1 Release Notes

October 2022

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About these Release Notes

These Release Notes describe all features that are included in Veeva Network 22R2.1.

SUBSCRIBE TO RELEASE NOTIFICATIONS

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- **Software releases and maintenance** - Go to trust.veeva.com. At the top of the page, click **Subscribe to Veeva Trust Site** and subscribe to the Veeva Network component.
- **Release Notes and Data Governance documents** - PDF files are posted on the Veeva Support website. To be notified when new documents are published, click the **Follow** button on that page or the Announcements section in the Network Community.

For more information, see About Network Releases in the *Veeva Network Online Help*.

Browser requirements

Veeva Network is tested and supported on the latest version of these browsers:

- Google Chrome™
- Apple® Safari®
- Microsoft® Edge

Veeva Network is not supported on mobile devices.

Release Note updates

The following changes were made since the Production Release Notes document was first published:

- **OpenData subscription enhancements** - To address performance issues, the **Downloaded Entity Count** and **OpenData Exports to Process** headings and data have been removed from the OpenData Subscriptions page and the country subscriptions.

  The topic and screenshots have been updated in this version of the Production Release Notes.

The following enhancements have been removed since the Early Release Notes document was published:

- **DCR enhancements** - Data Stewards can more easily navigate the page and identify sub-objects on add and change requests.
- **Suspect match enhancements** - Data Stewards can more easily navigate the suspect match page.

All material in the Release Notes should be reviewed to ensure that updates to existing topics are noted.

What's new

The following key enhancements comprise the Veeva Network 22R2.1 minor release.

		ST	DS	DM	AD
Hierarchy Explorer widget					
Performance	Widget users will notice performance improvements for page and data loading times.	●	●	●	●
Inbox					
Bulk approve tasks	Users can now approve tasks in bulk using the DCR Cleanup operation.		●	●	
Reject suspect match tasks	Suspect match tasks can now be included in bulk reject operations.		●	●	
Reports					
New sample queries	The Merged HCO and Merged HCP reports are now available as sample queries in the SQL Query Editor.		●	●	●
File Explorer					
Smart tables	Enhancements have been made to improve your user experience.			●	●
Veeva OpenData subscriptions					
Veeva OpenData subscription page	This page is updated to help you quickly access your subscribed countries.			●	●
Country subscription configurations	Country subscriptions now include details about the Veeva OpenData instance that your Network instance is connected to and the time that exported data is typically available.			●	●
Source subscriptions					
Merge addresses	Administrators can merge addresses in bulk on entities using source subscriptions.			●	●
Veeva connectors					
Veeva CRM Connector	The CRM connector type has been renamed to Salesforce.			●	●
Extract connector	The Salesforce and Vault Extract connectors can now extract files into a single compressed file.			●	●
Upsert connector	The Salesforce and Vault Upsert connectors can skip files that do not contain data.			●	●
Admin settings					
Workflow settings	A description is added to the Workflow settings page in Sandbox instances to indicate how data change requests will be processed.				●

Note: The System and Data Admin user has all the capabilities of the System Administrator and Data Steward users. Features and enhancements that apply to those users also apply to the System and Data Admin user.

Data Governance - Specific updates for fields and reference data are provided in the *Veeva Network Data Governance* release notes for every minor and major Network release.

Hierarchy Explorer widget

Enhancements have been added to Hierarchy Explorer to improve your user experience.

Note: The Hierarchy Explorer widget is available in Beta version. If you are interested in being an early adopter, contact Veeva Support.

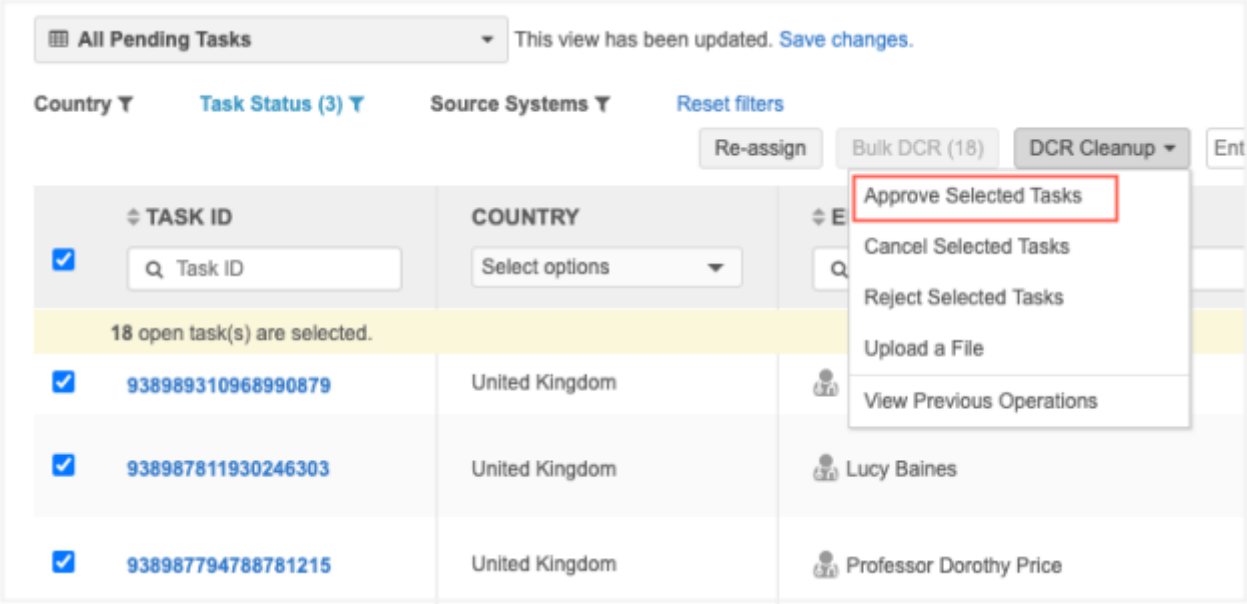
PERFORMANCE

Widget users will notice performance improvements when they change a hierarchy view by clicking a roll-up count or when they filter the hierarchy. The new hierarchy view opens and loads the data more quickly.

Inbox

APPROVE TASKS IN BULK

The **DCR Cleanup** button in the inbox was introduced in version 22R1.0 so Data Stewards can cancel and reject tasks in bulk. In this release, the ability to approve tasks in bulk is added.



This enhancement is added to the **DCR Cleanup** option by default in your Network instance.

The **DCR Cleanup** option is available only to users that have access to it through permission sets. Administrators must create permission sets and provide access to users.

For more information, see the Permission Sets topic in the *Veeva Network Online Help*.

Bulk approve options

Tasks can be approved in bulk using one of these options in the **DCR Cleanup** list:

- **Approve Selected Tasks** - Select the tasks to be approved in bulk. A limit of 500 tasks can be approved in each operation.

  When tasks are approved, a resolution note must be applied.

- **Upload a File** - Instead of selecting each task in the Inbox, you can bulk approve tasks by uploading a file that contains a single column: **task ID**. A limit of 500 tasks can be uploaded in each file.

  This option gives you more flexibility for approving tasks because it does not depend on access to the tasks. Your file can include tasks for any country and main object, even if you don't have access to the tasks through your inbox task groups.

Supported tasks

You can bulk approve the following tasks:

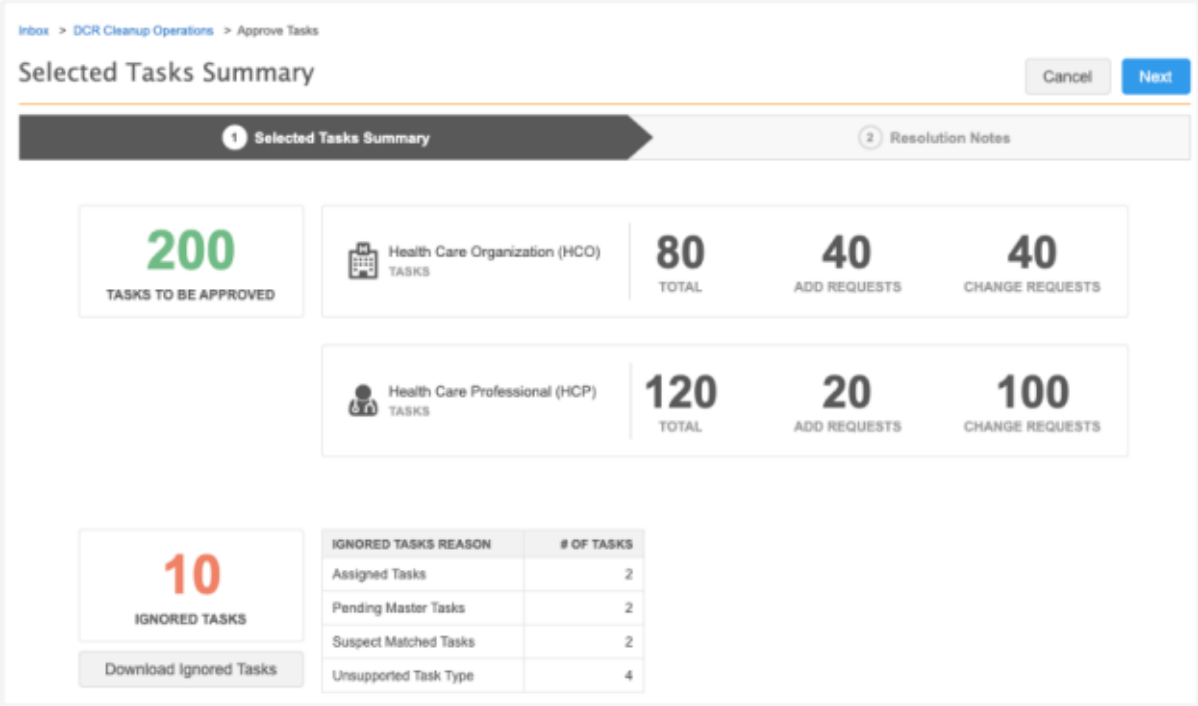
- add requests
- change requests

If you select tasks in the inbox, the tasks must be unassigned or assigned to the user running the operation. If you upload a file, assigned tasks can be included.

Tasks that are not supported

The following tasks will be ignored if they are included in the operation:

- Assigned tasks - Tasks that are assigned to other users.
  This applies to the **Approve Selected Tasks** operation only. It does not display if you have uploaded a file.
- Pending master tasks - Tasks that are pending review by Veeva OpenData.
- Suspect match tasks - These tasks must be approved individually.
- Unsupported task types - Job warnings and failed jobs.
- Duplicate Task IDs - Tasks are listed more than once in the file.
- Tasks with Invalid ID - Tasks that do not have a valid task ID.



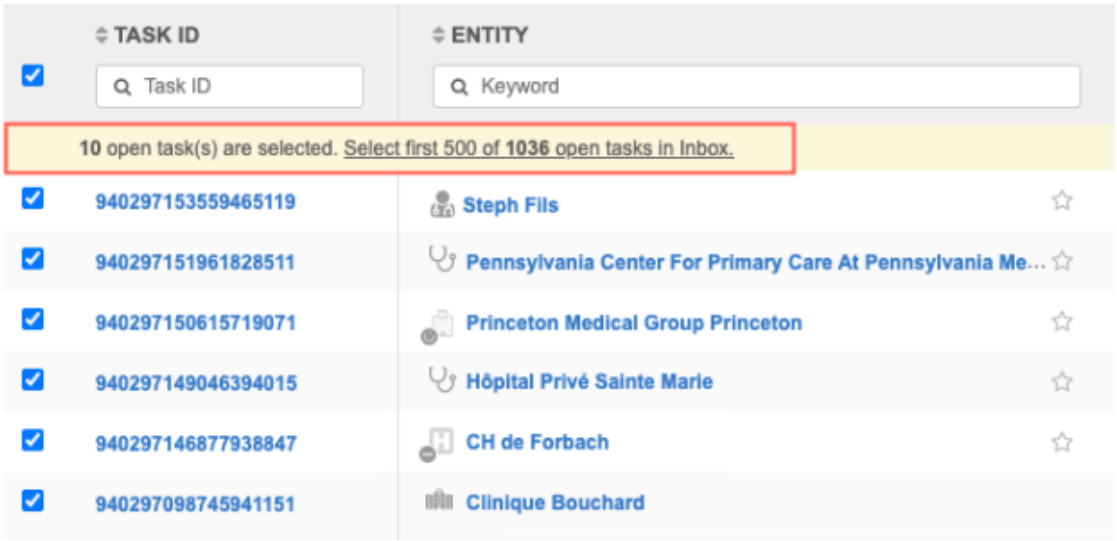
Approve selected tasks

To approve tasks in bulk:

1. In the Inbox, select the tasks to approve and click **DCR Cleanup > Approve Selected Tasks**.

   If you select the checkbox in the column header to select all tasks, a message displays a count of the selected tasks and an option to select the first 500 open tasks in the Inbox. Click the link to select those tasks. A maximum of 500 tasks can be selected for each operation.

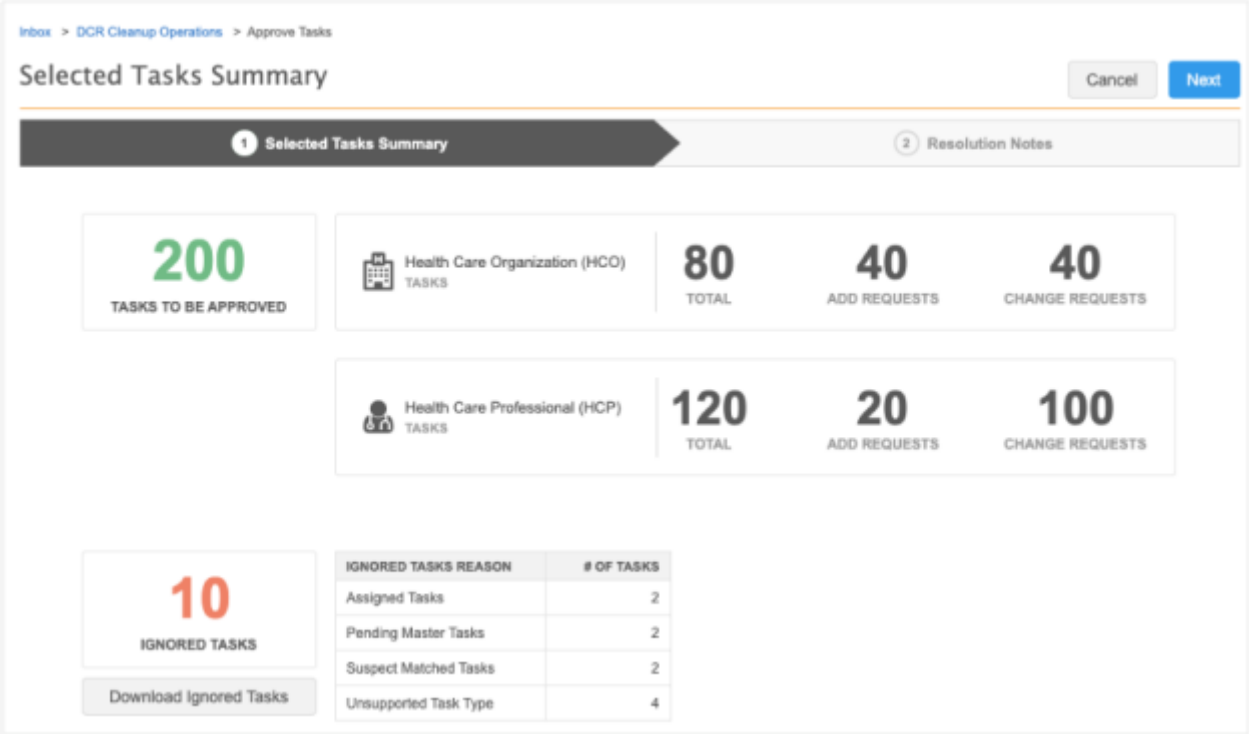
   Example



   The count at the bottom of the list is updated to display the number of selected records.

Tip: Include tasks that are being approved for the same reason; one resolution note will be applied to all the tasks in the operation.

2. The summary page opens. It provides a count of add requests and change requests for each selected object and a total count of records that will be approved in the operation.



Ignored tasks

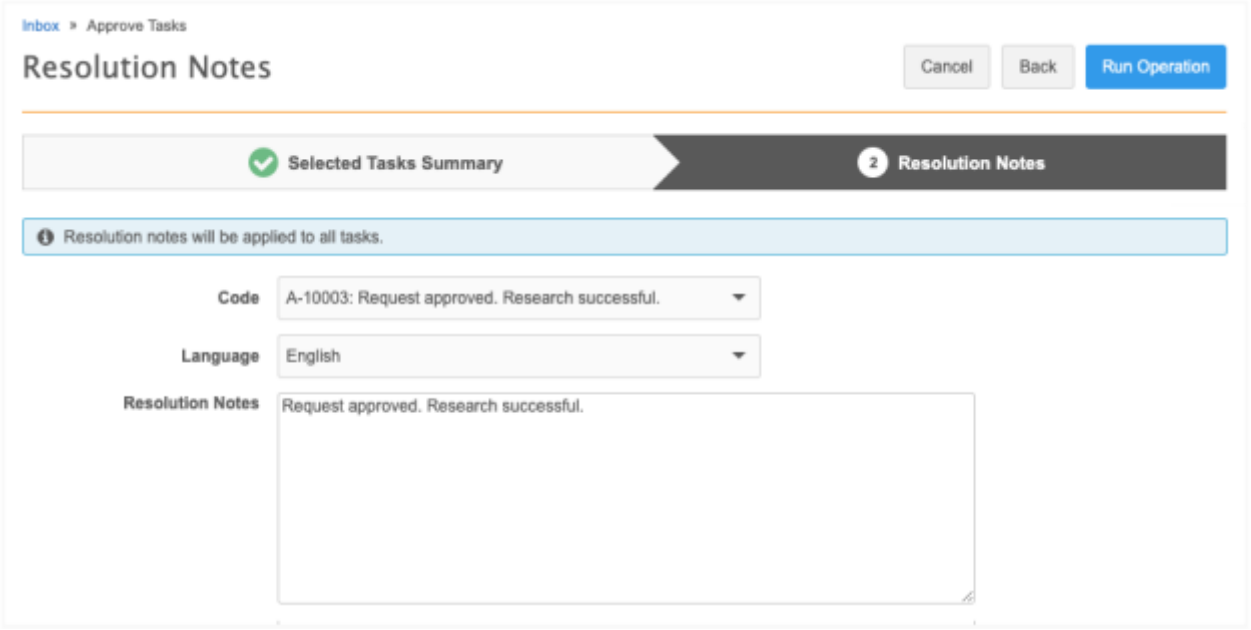
A count displays in this box if any of the tasks will be ignored because they cannot be approved for the following reasons:

- **Assigned tasks** - The task is assigned to a data steward.
- **Pending Master Tasks** - The task is pending review by Veeva OpenData.
- **Suspect Match Tasks** - The task is a suspect match. These tasks must be approved individually.
- **Unsupported Tasks Type** - Tasks that are Job Warnings or Failed Jobs.
- **Duplicate Task IDs** - Tasks that are listed more than once in the file.
- **Tasks with Invalid ID** - Tasks that do not contain a valid task ID.

Click **Next**.

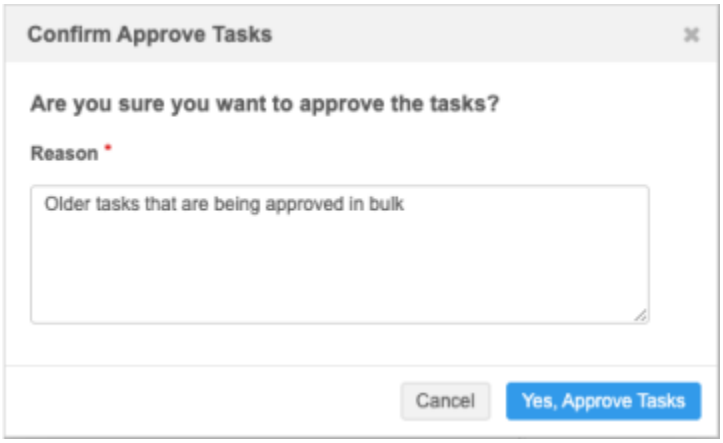
3. On the **Resolution Notes** step, define the resolution note that will be applied to all of the selected tasks. Only resolution notes that apply to all countries display.
   - **Code** - The reason for approving the tasks.
   - **Language** - The language the resolution note will display in.

     The localized message will display in the **Resolution Notes** field.

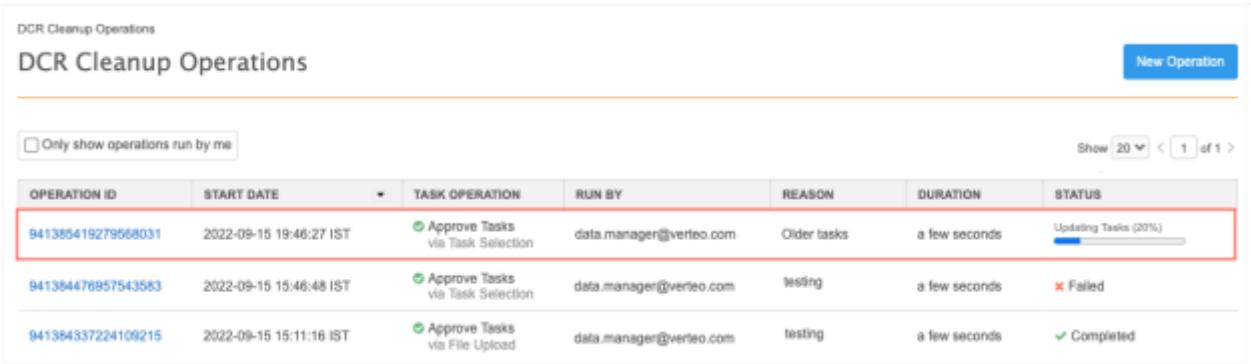


To continue, click **Run Operation**

4. In the **Confirm Approve Tasks** dialog, provide a reason and then click **Yes, Approve Tasks**.

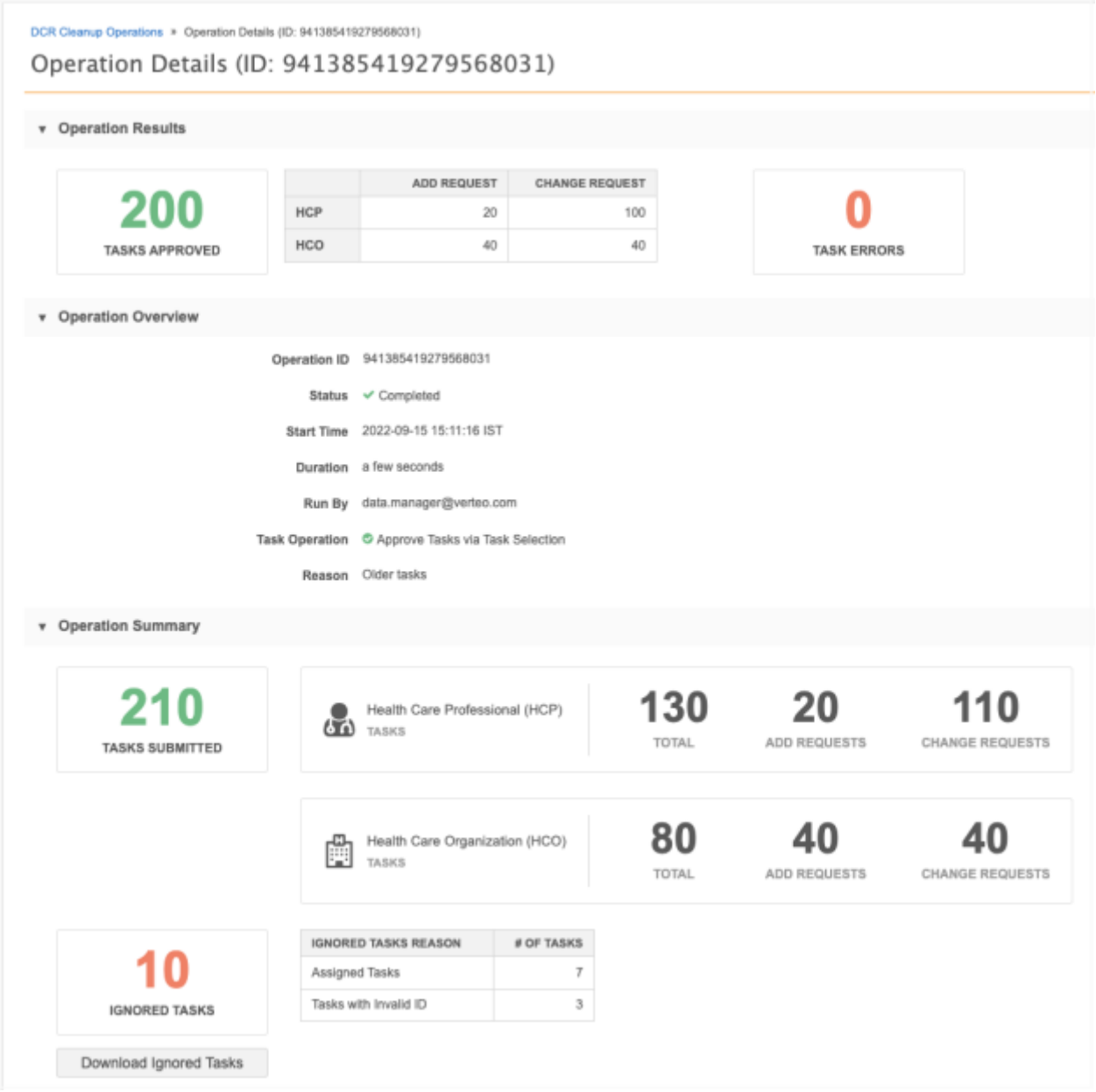


The DCR Cleanup Operations page opens and you can see from the message that the operation to approve the tasks has started.



5. When the operation completes, click the **Operation ID** to review the details.

   The Operation Details page displays a summary of the tasks that were submitted and approved.

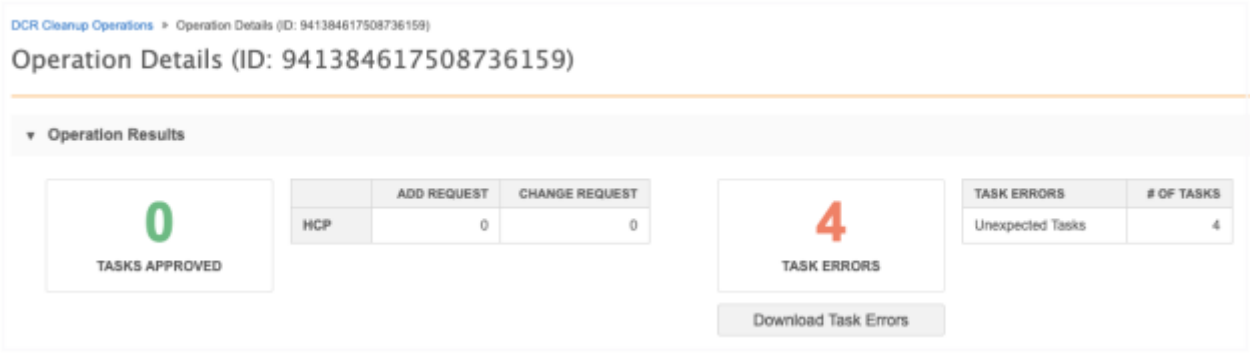


Ignored tasks

If the operation contains ignored tasks, a count and summary of the reasons display. Click **Download Ignored Tasks** to export a .csv file. The downloaded file identifies the task ID with the error (reason) so you can investigate further.

Task errors

If the approve operation contains errors, a count and summary of the errors display. Click **Download Task Errors** to export a .csv file that contains the task ID for each error.



Upload a file

Uploading a file gives you more flexibility for approving tasks in bulk. The file can contain tasks that are assigned and tasks for countries that you don't have access to through your inbox task groups.

File requirements

- **Format** - Comma separated value (.csv) and Microsoft® Excel® (.xlsx) files are supported.
- **Contents** - Must be a single column (**task_id**) containing the task IDs of the records that you want to approve.
- **Task limit** - A maximum of 500 tasks can be uploaded in each operation.
- **File Size** - Files can be up to 30MB.
- **Reason for approval** - Include tasks that are being approved for the same reason; one resolution note will be applied to all the tasks approved in the operation.

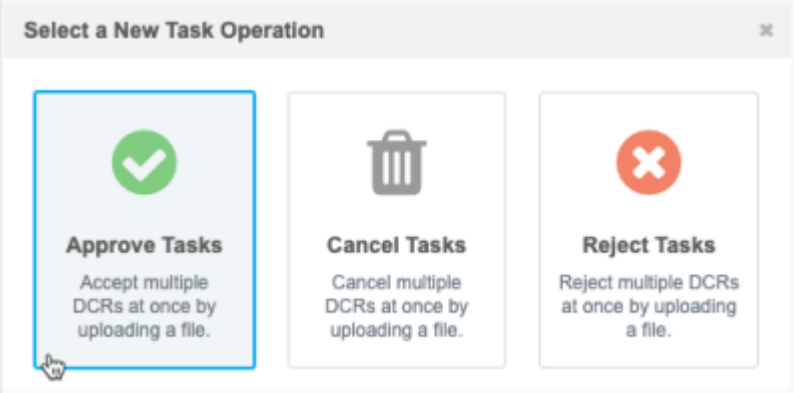
Example file

task_id
940297216797445279
940297214642949279
940297214103391391
940297213022178463

Tip: To retrieve the task IDs, export the Inbox and remove all the columns except the **task_id** column. Ensure that only the task IDs for the records that you want to approve are listed in the file. You can export the Inbox if you have permission through your assigned Inbox Task Group.

To upload a file:

1. In the Inbox, click **DCR Cleanup > Upload a File**.



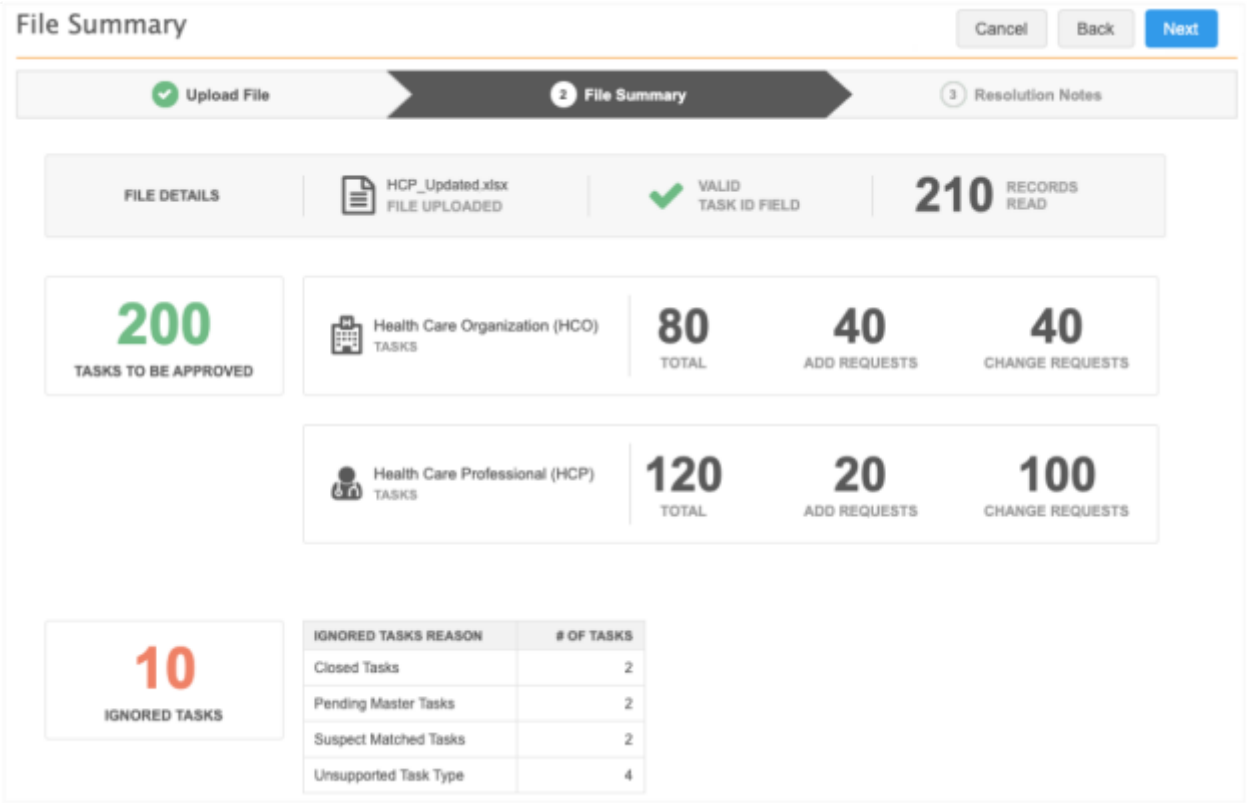
2. In the **Select a New Task Operation** dialog, choose **Approve Tasks**.

   The task options that are available depend on your assigned permission sets.

3. On Step 1, **Approve Tasks**, click **Upload File** to browse for a file or drag the file to the box.

   The file will be validated to ensure that it is the expected format and size and that it contains only the **task_id** column.

4. On Step 2, **File Summary**, review the details of the file that was uploaded and the records that will be approved. A total count of the tasks for each object and counts for each task type display.



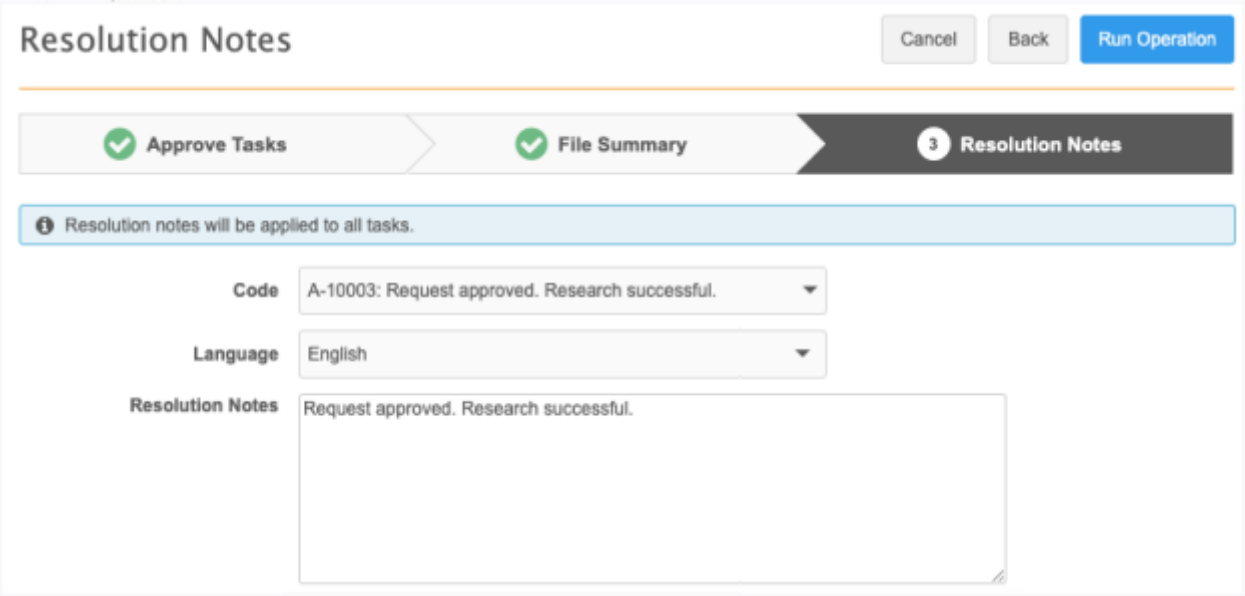
Ignored tasks

A count displays in this box if any of the tasks will not be approved for the following reasons:

- **Closed Tasks** - The task has already been closed.
- **Duplicate Task IDs** - The task is ignored because it is a duplicate.
- **Invalid Task IDs** - The task is not a DCR ID.
- **Pending Master Tasks** - The task is pending review by OpenData.
- **Suspect Match Tasks** - The task is a suspect match.
- **Unsupported Tasks Type** - Tasks that are Job Warnings or Failed Jobs.

5. Click **Next**.
6. On Step 3, **Resolution Notes**, define the resolution note that will be applied to all of the approved tasks.
   - **Code** - The reason for approving the tasks.
   - **Language** - The language the resolution note will display in.

     The localized message will display in the **Resolution Notes** field.



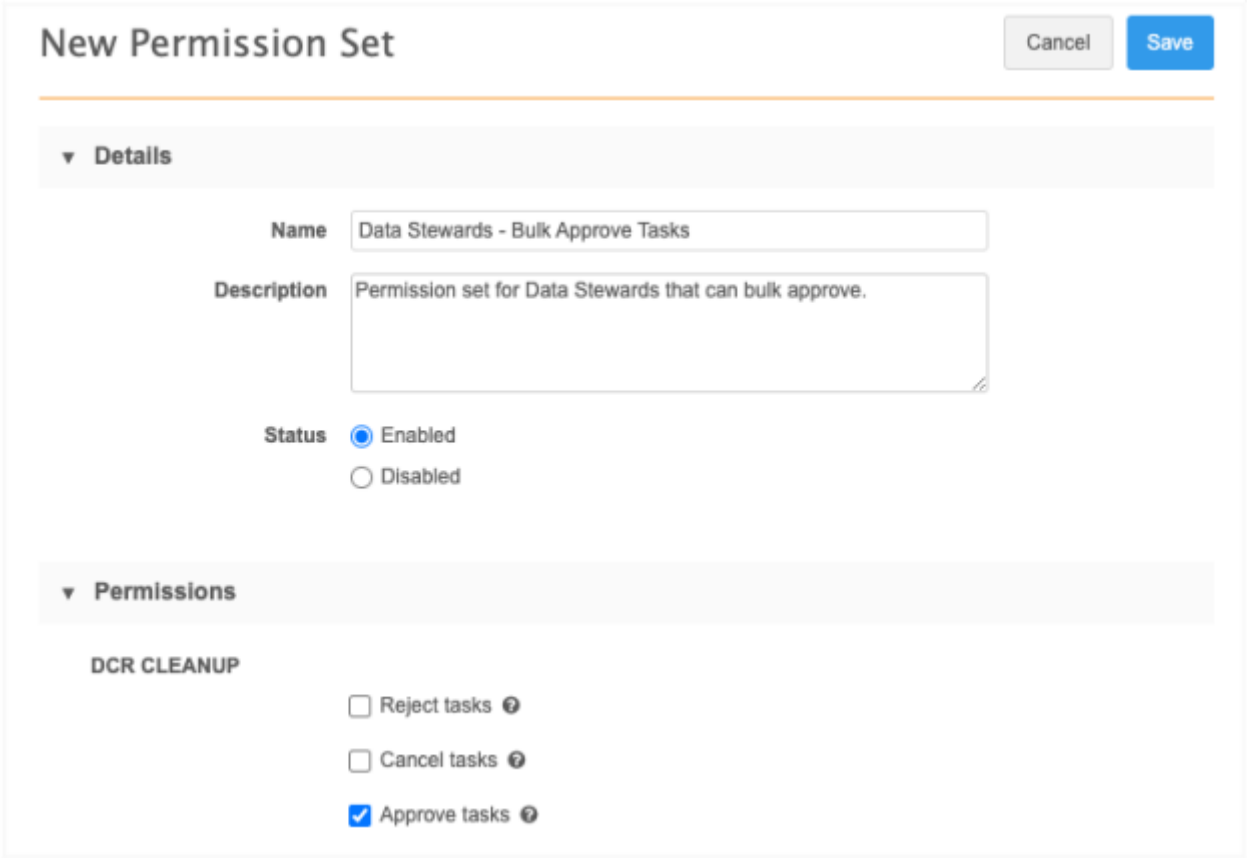
7. Click **Run Operation**.
8. In the **Confirm Approve Tasks** dialog, type a reason and click **Yes, Approve Tasks**.

   The DCR Cleanup Operations page opens so you can view the progress of the job. When the job completes, click the **Operation ID** to view the details of the job.

Permission sets

To support the ability to approve tasks in bulk, a new option is available for **DCR Cleanup** permissions (**Users & Permissions > Permission Sets**).

Administrators can assign the **Approve tasks** option to individual users or to user groups through the permission set.



For more information, see Permission Sets in the *Veeva Network Online Help*.

REJECT SUSPECT MATCH TASKS

Suspect match tasks are now supported for bulk reject operations. Previously, suspect match tasks that were included in bulk reject operations were ignored. Including suspect matches helps users clean up their inbox.

This enhancement is enabled by default in your Network instance.

Add request considerations

When suspect matches created from add requests are rejected in a bulk operation, the suspect match switches back to an add request. The add request could be automatically approved or could be sent to the Inbox for stewardship, depending on your workflow settings.

Reports

SAMPLE QUERIES

The following queries have been added as Sample Queries in the SQL Query Editor. These queries were previously available as Saved Reports but they have been discontinued. Use these sample queries to report on merged HCOs or HCPs.

These queries are available by default if Reporting is enabled in your Network instance.

Merged HCO Report

Entity: HCO

Country: All

Description: Report of HCOs merged starting from a given date.

Query

```
SELECT
           hco_surviving.vid__v AS "Veeva ID (Surviving)",
           hco_non_surviving.vid__v AS "Veeva ID (Non-Surviving)",
           hco_revision.created_at AS "Timestamp"

     FROM
         hco_revision
           INNER JOIN hco AS hco_non_surviving ON hco_revision.vid__v =
hco_non_surviving.vid__v
           INNER JOIN hco AS hco_surviving ON
hco_non_surviving.record_merged_vid__v = hco_surviving.vid__v
     WHERE
         hco_revision.record_state__v = 'MERGED_INTO'
         and hco_revision.created_at >= 'INSERT_DATE_HERE' -- i.e. '2022-
01-01'
```

Merged HCP Report

Entity: HCP

Country: All

Description: Report of HCPs merged starting from a given date.

Query

```
SELECT
           hcp_surviving.vid__v AS "Veeva ID (Surviving)",
           hcp_non_surviving.vid__v AS "Veeva ID (Non-Surviving)",
         hcp_revision.created_at AS "Timestamp"

     FROM
         hcp_revision
           INNER JOIN hcp AS hcp_non_surviving ON hcp_revision.vid__v =
```

```
hcp_non_surviving.vid__v
          INNER JOIN hcp AS hcp_surviving ON
hcp_non_surviving.record_merged_vid__v = hcp_surviving.vid__v
     WHERE
         hcp_revision.record_state__v = 'MERGED_INTO'
         and hcp_revision.created_at >= 'INSERT_DATE_HERE' -- i.e. '2022-
01-01'
```

Use a sample query

To report on merged HCOs and HCPs:

1. Select **Reports > SQL Query Editor** and click **Sample Queries**.
2. In the **Sample Queries** dialog, use the search bar to find the query or find the query in the HCO or HCP entity section.
3. Select the query and click **Insert Selected Query**.
4. In the query editor box, replace the `INSERT_DATE_HERE` placeholder with a date. The report will display all of the merges of that object from the date that you specify.
5. Click **Run Query** to view the results.

File Explorer

SMART TABLES

Use smart tables to open, view, and augment .csv files directly from File Explorer. In this release, enhancements have been made to improve the usability and performance of smart tables.

The following improvements have been made:

- **Sort columns** - Click anywhere on the header to sort the column. Previously, the sort function was available only by clicking on the **Sort** icon in the header. By default, the column is sorted in ascending order.
- **Resize columns** - Click and drag a cell border to manually resize the column. The column is resized when you release the border in the desired place.

  If the values are truncated in the column, hover to display the full value in a tooltip.

- **Performance** - Smart table data now loads more quickly when you open the file and as you scroll through the rows and columns.

These enhancements are enabled by default in your Network instance.

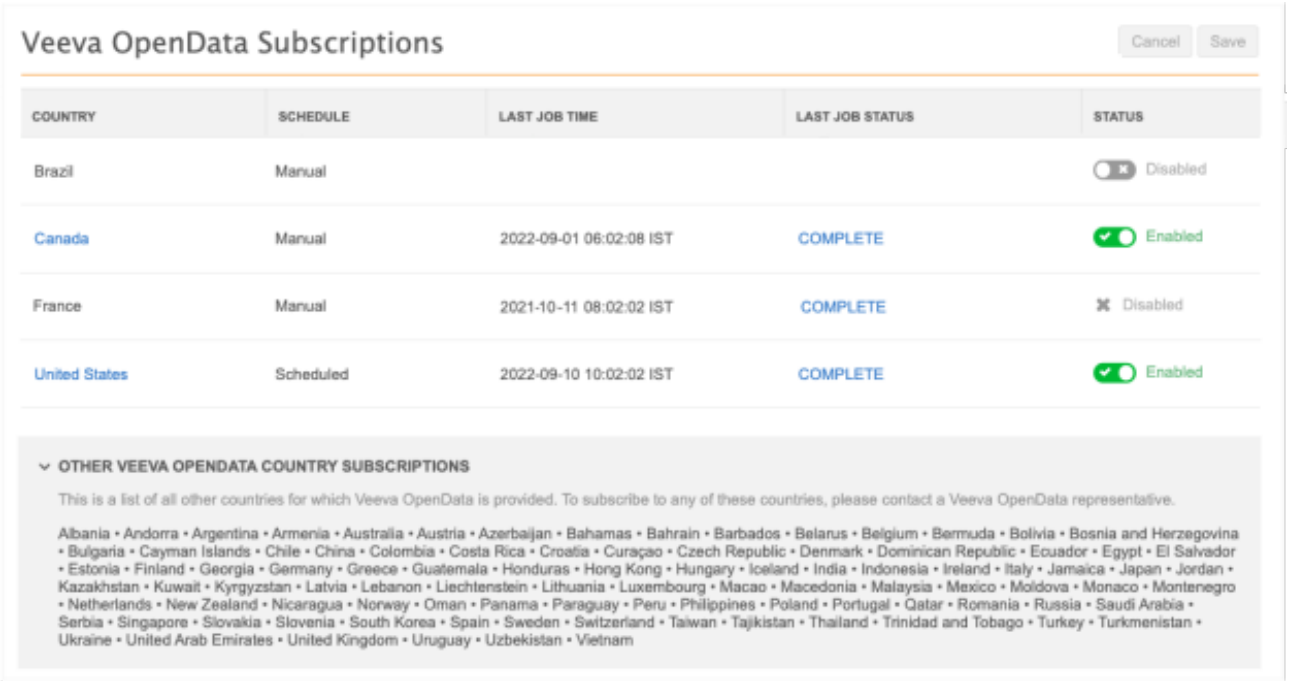
OpenData subscriptions

Enhancements have been made to the Veeva OpenData Subscriptions page and individual country configurations.

These enhancements are enabled by default in your Network instance.

VEEVA OPENDATA SUBSCRIPTIONS PAGE

The Veeva OpenData Subscriptions page is updated so that you can more easily access your subscribed countries.



Subscribed countries

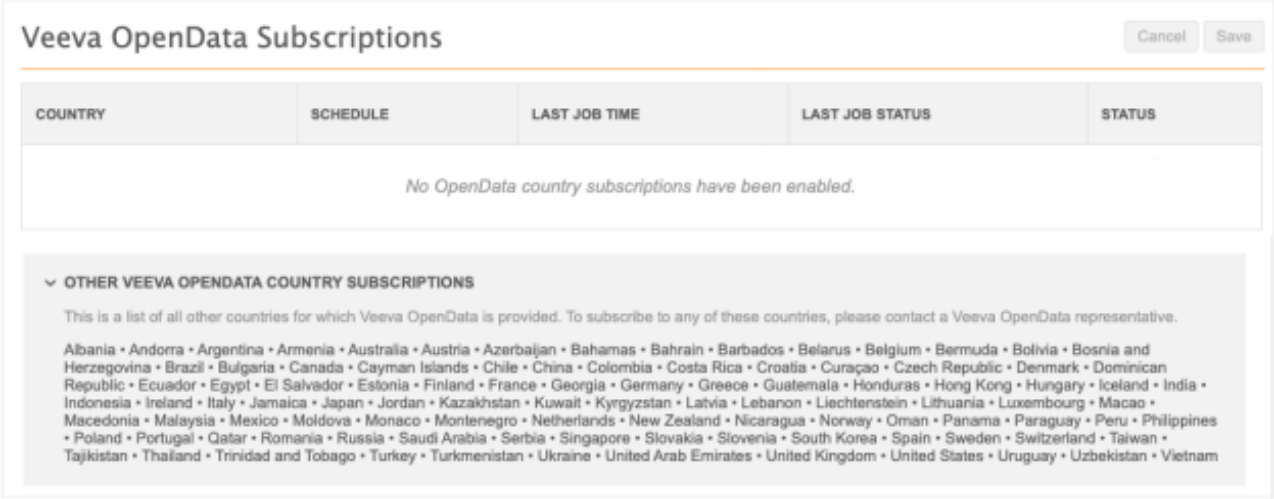
The active country subscriptions are listed at the top of the page. Country subscriptions that have been subscribed to but have not yet been configured, or that have previously been active are also listed.

The list includes details about each country in the following columns:

- **Country** - The country that you have subscribed to. If the country is enabled, the country name is a link. Click the country name to open the subscription configuration.
  By default, the countries are listed in alphabetical order (ascending).
- **Schedule** - Indicates if the country subscription is scheduled to run or is run manually.
- **Last Job Time** - The last time that the subscription job ran.
- **Last Job Status** - The status of the last subscription job that ran. Click the status to open the Job Details page for the last job.
- **Status** - Indicates if the country subscription is enabled or disabled.

- Enabled - The subscription is configured. The country name is a link to navigate to the subscription.
- Disabled - You subscribe to this country but you have disabled it in Network, or you have not enabled it yet.
- Disabled - The subscription has previously been enabled and at least one job has run, but you no longer subscribe to this country. It cannot be enabled on this page.

If no country subscriptions have been enabled in your Network instance, the Veeva OpenData Subscriptions page contains only the list of available countries.



Other Veeva OpenData country subscriptions

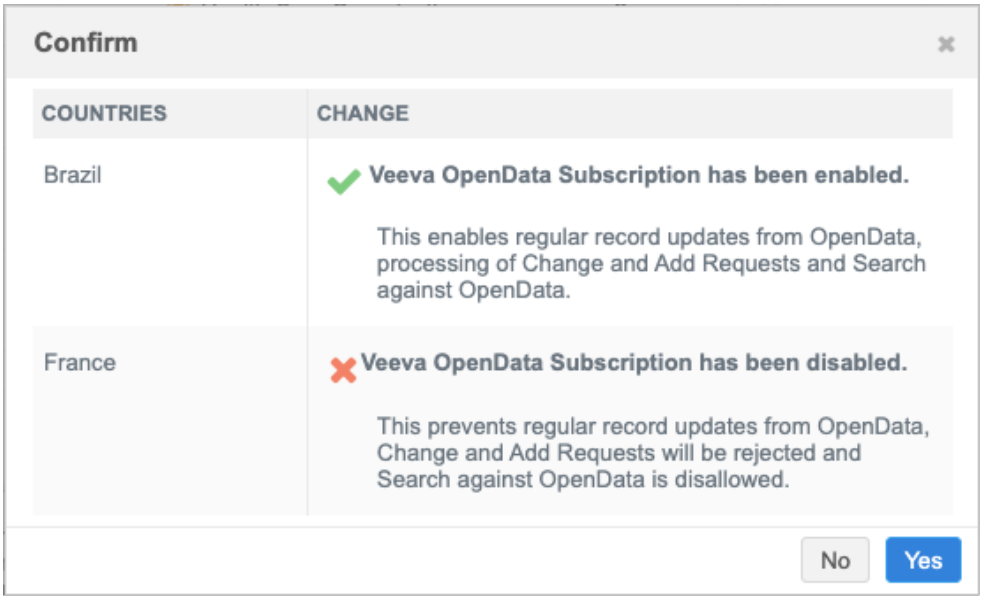
Countries that have not been subscribed to are listed in this section at the bottom of the page.

Sort the table

Sort the table by clicking a column header. Your sort order is retained when you revisit this page in future sessions.

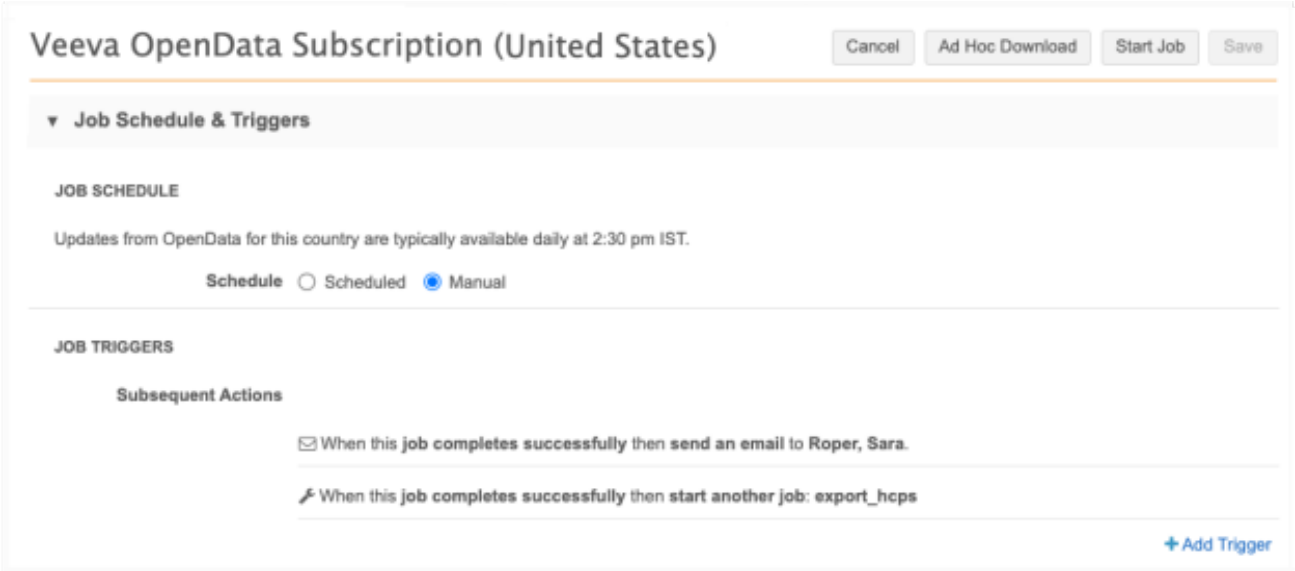
Save subscription changes

After you enable or disable a subscription on this page and click **Save**, a confirmation message displays with a summary of your changes. Review the details in the message.



COUNTRY SUBSCRIPTION CONFIGURATIONS

Country subscriptions are updated to include additional information about the downloaded entities and the files that will be processed the next time the subscription runs. The page also identifies the OpenData instance that your Network instance is connected to.



Job Schedule & Triggers

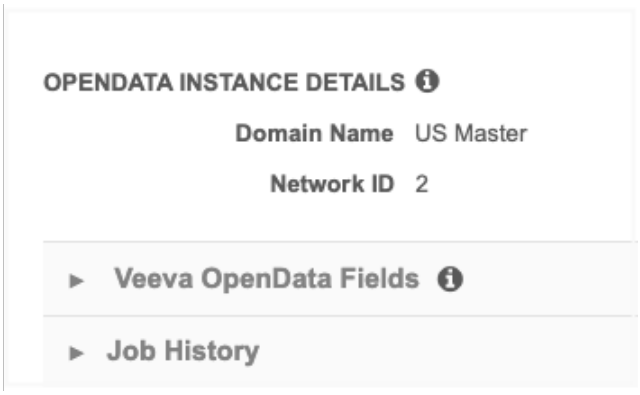
This section (previously call *Job Trigger Configuration*) is relocated near the top of the page and provides the following new information:

- **Updates from OpenData** - The time of day that updates are available using the time zone of the user viewing the page. If a schedule is not set for an OpenData instance, administrators will see the following message: *OpenData provides updates for records for this country at their discretion*.

Veeva OpenData Subscription Details

This section contains a new heading called **OpenData Instance Details**.

- **Domain Name** - The OpenData instance name that your Network instance is connected to for this country subscription.
- **Network ID** - The OpenData instance ID.



Source subscriptions

MERGING DUPLICATE ADDRESSES

Source subscriptions can now be used to merge addresses in bulk. Administrators and Data Managers can create source files to merge two addresses on an HCO or HCP. When two addresses are merged on an entity, the custom keys of the losing address are added to the winning address.

This feature is not enabled by default. To enable it for your Network instance, contact Veeva Support.

Addresses supported for bulk merge

Bulk merges are supported for the following types of addresses:

- Customer-managed into customer-managed
- Customer-managed into Veeva OpenData managed
- Customer-manager into third party managed

Merging Veeva OpenData or third party owned addresses into customer-managed addresses is not supported. OpenData and third party addresses always win when they are merged with customer-managed addresses.

Source file requirements

To bulk merge addresses, an entity file and an address file must be loaded into the source subscription.

Entity file (HCO, HCP)

Tip: You can include an HCP file and an HCO file in the same bulk merge job.

The file must be a single column containing the following data:

- ID or key of the HCP or HCO

Examples

HCP file

vid__v
243242421553464326

HCO file

vid__v
243242421553464375

Address file

The address file identifies the entity and the two addresses that are being merged.

Include the following data in the file:

- Veeva ID (entity_vid__v) of the HCP or HCO
- VID (vid__v) of the losing address
- VID (merge_survivor_vid) of the winning address

Example

entity_vid__v	vid__v	merge_survivor_vid
243242421553464326	43324242155346479	54454242155346434
243242421553464375	33324242155795746	57654565495231456

Source subscription properties

To bulk merge addresses, the following property must be added to the **Advanced Properties** in the source subscription configuration.

- **"job.merge.allowSourceMerge": "true",**

The bulk merge job adds the custom keys from the losing address to the winning address. If you do not want the keys moved to the winning address, include this property:

- **"job.merge.mergeInstruction.ADDRESS": "NoKeysMerge",**

Important: If custom keys remain on the losing address, any updates from sources using custom keys will update the losing address.

Job issues

When the job runs, the data is validated. Addresses that do not meet the requirements will be skipped so the job can continue.

Addresses are not merged for the following reasons:

- The losing or winning addresses are not sub-objects of the main entity.
- The entity does not exist.
- The address does not exist.
- The losing address is owned by Veeva OpenData or a third party source.
- The record state is Under_Review for the winning or losing address.
- The winning or losing address is copied to the entity from a parent affiliation through Network Address Inheritance.

On the Job Details page, the **Job Error Log** section displays a message if any of these issues occur.

Example

Network address inheritance considerations

Inherited addresses will be resynced during the next Network address inheritance Refresh job if the parent address is merged into another address.

Primary address considerations

Primary addresses are retained during the bulk merge job. If either of the addresses were defined as a primary address before the merge, the winning address will be set to primary during the bulk merge job.

Network calculated primary addresses

If the winning address is inactive or invalid, the primary address will be recalculated to find a new primary address on the entity.

Unique checkbox primary addresses

The options that you have selected in the unique checkbox configuration determines if the primary address should be recalculated.

License considerations

If the losing address is linked to any license on the entity, the license will be updated with the winning address.

Data change requests

Change requests submitted for the losing address will be automatically rejected. For In-Queue and associated tasks, the task will be closed automatically if the change requests applies only to the losing address. If the change request contains other changes, the change for the losing address is rejected and Data Stewards can process the remaining changes.

Veeva Connectors

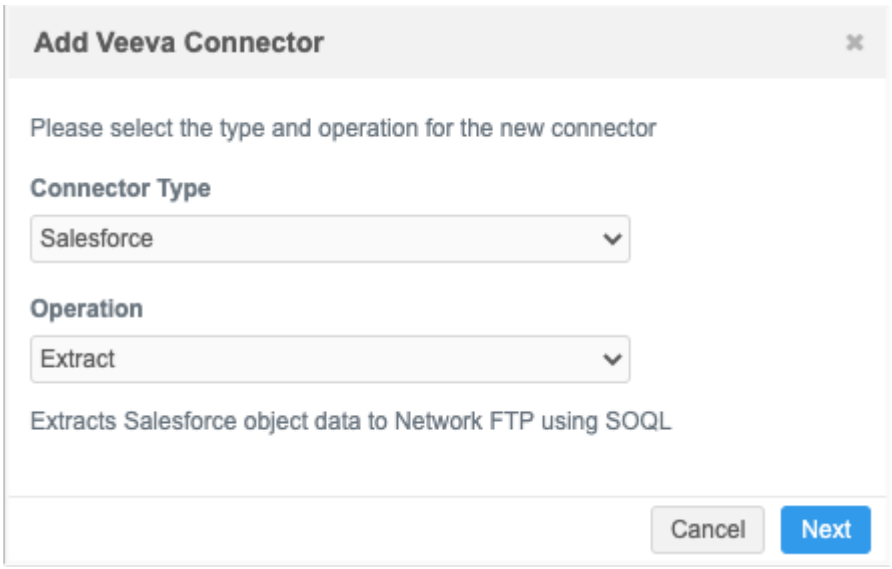
Several enhancements have been made to the Upsert and Extract Veeva Connectors.

These enhancements are enabled by default in your Network instance.

VEEVA CONNECTORS FOR CRM

The **CRM** connector type has been renamed to **Salesforce**. This reflects the different applications where you can use the connector; for example, Veeva CRM, Salesforce®, Service Cloud®, and so on.

Previous Name	New Name
CRM Extract Connector	Salesforce Extract Connector
CRM Upsert Connector	Salesforce Upsert Connector



EXTRACT CONNECTORS

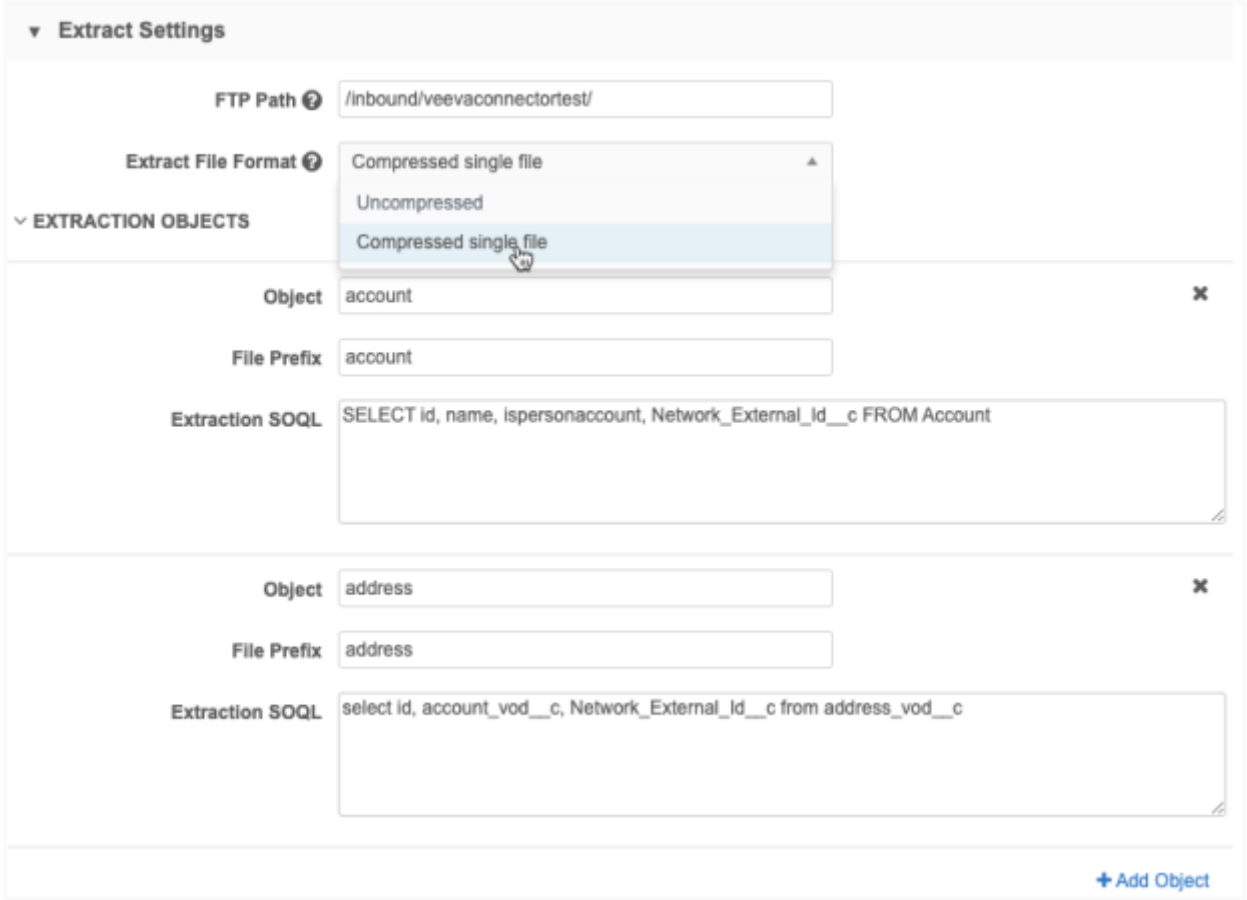
The Salesforce (previously called *CRM*) and Vault Extract connectors can now compress .csv files into a single .zip file. This is helpful when you use extracted files in a source subscription because multiple files must be loaded from a compressed single file or a unique sub-folder.

Compress files

To extract files into a single compressed file, a new setting called **Extract File Format** has been added to Extract connector configurations.

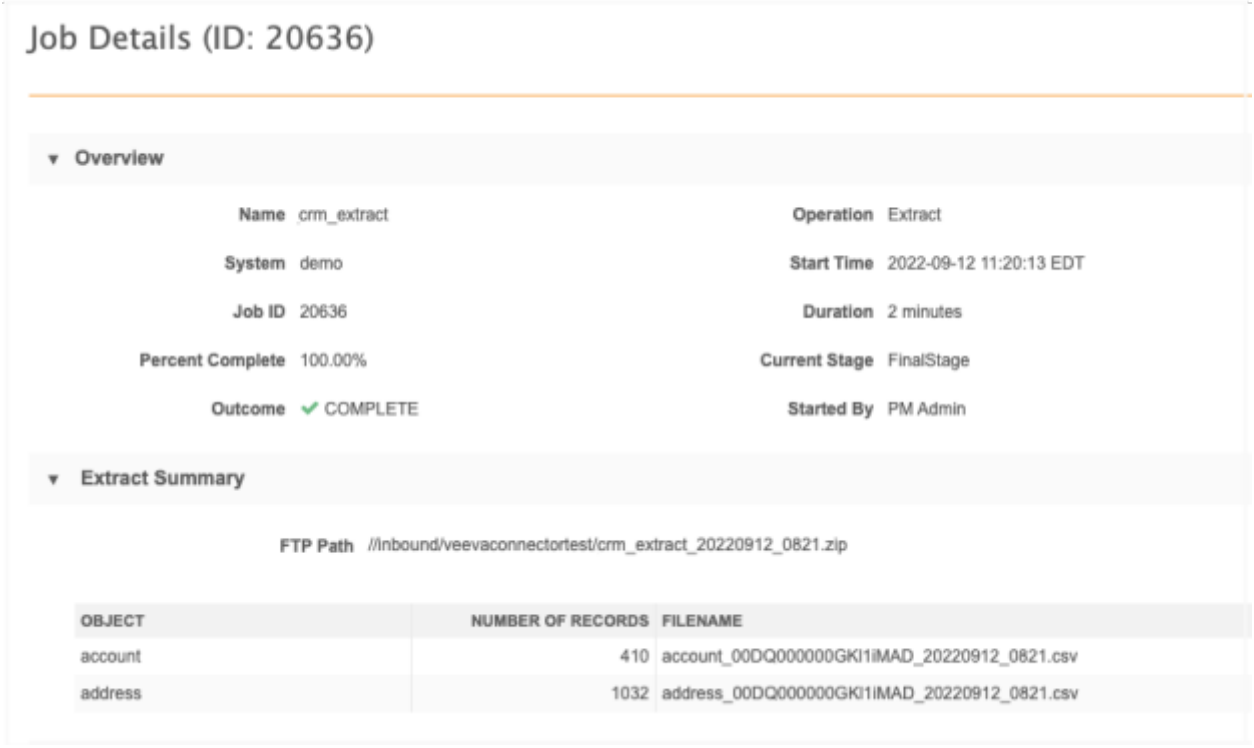
The **Extract File Format** setting contains two options:

- **Uncompressed** - Extract each object in individual .csv files. This is the default option.
- **Compressed Single File** - Compress the extracted files into a compressed (.zip) file.



After the Extract connector runs, the compressed file is saved to the FTP path with the following name format: <*veeva_connector_name*>_<*date_and_time*>`.zip`.

On the Job Details page, the **Extract Summary** section displays the compressed file name and the individual .csv file names.



Job Details (ID: 20636)

▾ Overview

Name	crm_extract	**Operation**	Extract
System	demo	**Start Time**	2022-09-12 11:20:13 EDT
Job ID	20636	**Duration**	2 minutes
Percent Complete	100.00%	**Current Stage**	FinalStage
Outcome	✔ COMPLETE	**Started By**	PM Admin

▾ Extract Summary

FTP Path //inbound/veevaconnectortest/crm_extract_20220912_0821.zip

OBJECT	NUMBER OF RECORDS	FILENAME
account	410	account_00DQ000000GKI1iMAD_20220912_0821.csv
address	1032	address_00DQ000000GKI1iMAD_20220912_0821.csv

UPSERT CONNECTORS

The Salesforce and Vault Upsert connectors will now skip loading a file if it is empty. Target subscriptions can generate empty .csv files when they are set to delta. Previously, the Upsert connector job immediately failed if a .csv file did not have data. Now, the file will be skipped and the Upsert job can complete.

The **Upsert Summary** section on the Job Details page displays any files that were skipped. The **Records Processed** and **Records Failed** columns display a zero (0) count.

▾ Upsert Summary

FTP Path outbound/VaultMedcomms/MedcommsProductExport/exp_00002433.zip

SOURCE FILE NAME	OBJECT NAME	RECORDS PROCESSED	RECORDS FAILED
product_v__c.csv	product__v	0	0

Admin settings

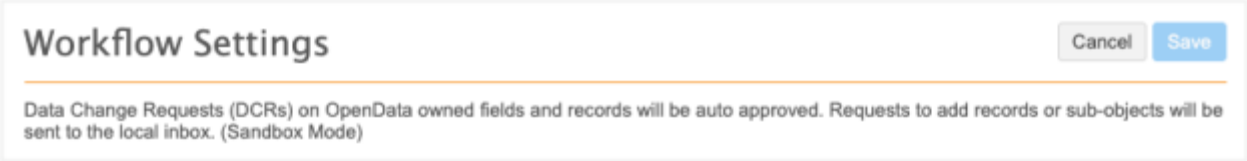
WORKFLOW SETTINGS

For Sandbox instances only, a description is added to the Workflow settings page to indicate how the instance will process data change requests.

Sandboxes can have one of the following configurations:

- **Sandbox is connected to an OpenData instance** - Data change requests on OpenData owned fields and records are routed to OpenData. All other requests will be processed locally according to the workflow settings on the page.
- **Sandbox is not connected to an OpenData instance** - Data change requests on OpenData owned fields and records are automatically approved. All other requests will be processed locally according to the workflow settings on the page.

Example - Sandbox not connected to OpenData



This enhancement is enabled in your Sandbox instance by default.