



veeva Network

Veeva Network 22R1.0.1 Release Notes

April 2022



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About these Release Notes

These Release Notes describe all features that are included in Veeva Network 22R1.0.

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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 enhancement has been added since the Early Release Notes document was published.

- **Search** - Specialty information now displays in the partial results when you search for a record.

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 22R1.0 major release.

			ST	DS	DM	AD
Network widgets						
Hierarchy Explorer export	Hierarchies can be exported to a Microsoft Excel (.xlsx) file.	22R1.0	●	●	●	●
Hierarchy Explorer enhancements	The Hierarchy Explorer now supports custom hierarchies, displays parent affiliations for HCPs, and logs user searches in the Search Audit Log.	21R3.1	●	●	●	●
Search/Profiles						
Network hashtags	The #phs and #pharmacist hashtags have been added to the list of predefined hashtags.	21R3.1	●	●	●	●
Search						
Specialty information	Specialty information now displays in the partial results when you search for a record.	22R1.0	●	●	●	●
Profiles						
Notes	Users can add notes to record profiles.	21R3.1	●	●	●	●
Inbox						
DCR cleanup	Users can now reject or cancel tasks in bulk operations.	22R1.0	●	●	●	●
File Explorer						
Network File System	Use the File Explorer to see and manage your file system directly within Network.	22R1.0	●	●	●	●
Data Model						
Supported countries	Veeva OpenData data models have been added for Hong Kong, Macao, and Taiwan.	22R1.0			●	●
New language	Albanian (SQ) is now supported as a reference language.	22R1.0			●	●
Formatted name	HCO and HCP name formatting rules have been added for Hong Kong, Macao, and Taiwan.	22R1.0			●	●
Field updates and merges	The process for updating and merging records now considers how the field is managed.	21R3.1			●	●



			ST	DS	DM	AD
Match						
Default match rules for European countries	Default match rules have been added to the change_request subscription for HCPs and HCOs.	21R3.1			●	●
Default match rules for Singapore	Default match rules have been added to all subscriptions for HCPs and HCOs.	21R3.1			●	●
Source subscriptions						
Field mapping improvements	The contents of the sample file are used for Network field mapping suggestions.	22R1.0			●	●
Field mapping suggestions	The wizard now provides Network field suggestions to map to the column headers in your sample file.	21R3.1			●	●
Data Export						
Transformation queries	Network can now transform data so you can export it in the format that downstream systems can easily receive.	22R1.0			●	●
Users						
Permission sets	Administrators can now provide access to features using user groups. In this release Permission Sets are supported for the DCR Cleanup feature.	22R1.0			●	●
Audit						
System Audit Log	The System Audit Log now tracks all exports from your Network instance.	22R1.0				●
API						
Version update	The Network API is updated to v26.0.	22R1.0				Developers
Supported languages	Use the Metadata API to retrieve the list of supported reference data languages.	22R1.0				Developers

Note: The System and Data Admin user has all of 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.



Network widgets

The Hierarchy Explorer widget was introduced 21R3.0 to help you explore entire health systems from a top-down approach. All levels of the hierarchy display so you can search through it to find new targets and to visualize and understand the hierarchy.

The following enhancements have been added:

EXPORTING HIERARCHY EXPLORER DATA

22R1

You can now export hierarchies to a Microsoft® Excel® file so you can share it with other users or further investigate the details.

Select the HCPs or HCOs that you want to export or export the entire hierarchy. You can use the data to analyze the hierarchy; for example, use the data to understand the biggest HCOs (sort by total number of HCPs), calculate the levels inside the hierarchy, and analyze the geographies where HCOs are located.

This enhancement is enabled by default in the widget.

HCO example

Filter the root HCO to find organizations with HCPs that specialize in neurology. When the hierarchy is filtered, select all the HCOs and click **Export to Excel**.



Hierarchy Explorer > Sutter Health BETA

Sutter Health
2200 River Plaza Dr Sacramento CA 95833-4134
[View Profile](#)

All Hierarchies | Sales Hierarchy | Neurology Hierarchy | Oncology Hierarchy | Ownership Hierarchy

Explore HCOs | Explore HCPs

Showing 6 Direct HCOs in Sutter Health [Export to Excel](#)

Active Filters (1) | HCP Specialty: **Neurology**

<input checked="" type="checkbox"/>	Health Care Organization	HCO Type	HCP Roll-Ups		Major Class of Trade	HCO Specialty
<input checked="" type="checkbox"/>	California Pacific Medical Center 3801 Sacramento St Ste 216 San Francisco CA 94118 US View Child HCOs and HCPs	Organization, Group Practice	DIRECT 2	TOTAL 3	Medical Group Outpatient	General Surgery, Multi Specialty Practice, Neurology, Pediatrics
<input checked="" type="checkbox"/>	California Pacific Medical Center 730 Welch Rd Ste 206 Palo Alto CA 94304-1504 View Child HCOs and HCPs	Organization, Group Practice	DIRECT 2	TOTAL 3	Medical Group Outpatient	Neurology
<input checked="" type="checkbox"/>	Lucile Packard Childrens Hospital 750 Welch Rd Ste 317 Palo Alto CA 94304-1510 US View Child HCOs and HCPs	Organization, Group Practice	DIRECT 2	TOTAL 2	Medical Group Outpatient	Neurology, Pediatrics
<input checked="" type="checkbox"/>	Mills Peninsula Medical Center 1501 Trousdale Dr Burlingame CA 94010-4506 View Child HCOs and HCPs	Organization, Hospital	DIRECT 1	TOTAL 2	Hospitals	Multi Specialty Practice
<input checked="" type="checkbox"/>	Mills-Peninsula Medical Center 101 N El Camino Real Ste 5 San Mateo CA 94401-2795 View Child HCOs and HCPs	Organization, Group Practice	DIRECT 1	TOTAL 1	Medical Group Outpatient	Neurology
<input checked="" type="checkbox"/>	Sutter Solano Medical Center 300 Hospital Dr Vallejo CA 94589-2574 View Child HCOs and HCPs	Organization, Hospital	DIRECT 1	TOTAL 1	Hospitals	Multi Specialty Practice

The exported file contains those neurology facilities.

	A	B	C	D	E	F	G	H	I	J
1	Corporate Name	Veeva ID	HCO Type	Full address	City	State/Provin	Zip/Postal	Record Owner	Major Class of Tr	All Specialties
2	California Pacific Medical Center	930763697104291743	Organization, Group Pr	3801 Sacramento St Ste 216 San Francis	California	94118	OpenData	Medical Group C	General Surgery; Mu	1
3	California Pacific Medical Center	931601497261017009	Organization, Group Pr	730 Welch Rd Ste 206 Palo A Palo Alto	California	94304-150	OpenData	Medical Group C	Neurology	1
4	Lucile Packard Childrens Hospital	931220513771489183	Organization, Group Pr	750 Welch Rd Ste 317 Palo A Palo Alto	California	94304-151	OpenData	Medical Group C	Neurology; Pediatric	1
5	Mills Peninsula Medical Center	942976974287406081	Organization, Hospital	1501 Trousdale Dr Burlingan Burlingame	California	94010-450	OpenData	Hospitals	Multi Specialty Pract	1
6	Mills-Peninsula Medical Center	931601497265604533	Organization, Group Pr	101 N El Camino Real Ste 5 S San Mateo	California	94401-279	OpenData	Medical Group C	Neurology	1
7	Sutter Solano Medical Center	942976994420065281	Organization, Hospital	300 Hospital Dr Vallejo CA 94 Vallejo	California	94589-257	OpenData	Hospitals	Multi Specialty Pract	1



Exported files for HCOs contain the details that you can view in the Hierarchy Explorer, plus additional data:

- **Corporate Name** - Name of the HCO.
- **Veeva ID** - Unique identifier for the HCO.
- **HCO Type** - For example, Hospital, Pharmacy Group, Department, and so on.
- **Address** - Full Address, City, State/Province, and Zip/Postal Code.
- **Record Owner** - Locally Managed or OpenData
- **Additional fields** - Fields that your administrator has defined in the widget configuration (for example, Major Class of Trade, All Specialties)
- **HCP Counts** – Direct and total (directly and indirectly related) counts of related HCPs.
- **Parent Affiliation** - The related parent HCO.
- **Parent Veeva ID** - Veeva ID of the parent HCO.
- **Hierarchy** - HCOs in the immediate hierarchy. Hierarchy levels are separated by the pipe (|) character. For example: Health System A | Hospital A | Department A.
- **Veeva ID Hierarchy** - The Veeva IDs of the HCOs in the hierarchy. For example:
937932943268120161 | 937932943268120169 | 937932943268120173.

M	N	O	P
Parent Affiliation	Parent Veeva ID	Hierarchy	Veeva ID Hierarchy
Sutter Health	937932943269103202	Sutter Health	937932943269103202
Sutter Health	937932943269103202	Sutter Health	937932943269103202
Alta Bates Summit Medical Center	937932943267726947	Sutter Health Alta Bates Summit Medical Center Sutter Bay Hospitals Summit	937932943269103202 937932943267726947
Sutter Bay Hospitals Summit Medical Center Public	937932943269430910	Sutter Health Alta Bates Summit Medical Center Sutter Bay Hospitals Summit	937932943269103202 937932943267726947 937932943269430910
Sutter Bay Hospitals Summit Medical Center Public	937932943269430910	Sutter Health Alta Bates Summit Medical Center Sutter Bay Hospitals Summit	937932943269103202 937932943267726947 937932943269430910
Sutter Health	937932943269103202	Sutter Health	937932943269103202

HCP example

On the **Explore HCP** tab, you can filter to find all HCPs that are neurologists within the hierarchy. When the HCPs display, select them all and click **Export to Excel**.

The screenshot shows the 'Hierarchy Explorer' interface for 'Sutter Health'. It displays a list of HCPs filtered by the specialty 'Neurology'. Two HCPs are visible: Chris Kelly and Dan Belfield. Both are listed as 'Prescriber' HCPs with 'Neurology' as their specialty. Chris Kelly's medical degree is 'Doctor of Medicine' and his Veeva ID is 243169400314659846. Dan Belfield's medical degree is also 'Doctor of Medicine' and his Veeva ID is 243229654243083267. The interface includes navigation tabs for 'All Hierarchies', 'Sales Hierarchy', 'Neurology Hierarchy', 'Oncology Hierarchy', and 'Ownership Hierarchy'. There are also buttons for 'Explore HCOs', 'Explore HCPs', and 'Export to Excel'.

The exported file contains those neurology specialists.

The screenshot shows an Excel spreadsheet titled 'HCPs in Sutter Health 2022-03-08T14_30_11'. The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H	I	J	
1	First Name	Last Name	Veeva ID	NPI	HCP Type	Record Owner Type	Full address	City	State/Prov	Zip/Postal Co	All Specialties
2	Chris	Kelly	243169400314659846	1215092382	Prescriber	OpenData	750 Welch Rd Ste 317 Palo Alto CA 9	Palo Alto	California	94304-1510	Child Neurology; Neurodev
3	Dan	Belfield	243229654243083267	1740206457	Prescriber	OpenData	101 N El Camino Real Ste 5 San Matr	San Mateo	California	94401-2795	Neurology



Exported files for HCPs contain the details that you can view in the Hierarchy Explorer, plus some additional data:

- **Names** - First and last names.
- **Veeva ID** - Unique identifier for the HCO.
- **NPI** - NPI number for HCPs in the United States.
- **HCP Type** – For example, Prescriber, Dentist, Pharmacist, and so on.
- **Record Owner** - Locally Managed or OpenData.
- **Address** - Full Address, City, State/Province, and Zip/Postal Code.
- **Additional fields** - Fields that your administrator has defined in the widget configuration (for example, All Medical Degrees, All Specialties)
- **Relationship to <focused HCO>** - The relationship type to the focused HCO; for example, *Affiliation* or no value if it is an indirect relationship.
- **Parent Organizations** - The active parent organizations that the HCP is affiliated with. The HCOs that those organizations roll up to display in parenthesis (). For example: *Hospital A (Health System A)*.
- **Parent Veeva ID** - The Veeva IDs of the health systems that the HCP is affiliated with.

M	N	O
Relationship Type to Sutter H	Parent Organizations	Parent Veeva ID
Affiliation	California Pacific Medical Center (Sutter Health); California Pacific Medical Center (Sutter Health); Mills Peninsula Medical Center (Sutter Health); Mills Peninsula Medical Center (Sutter Health)	930763697104291743; 931601497261017009; 931220513771489183; 242979608561976321; 242979608561976321; 242979608561976321; 242979608561976321

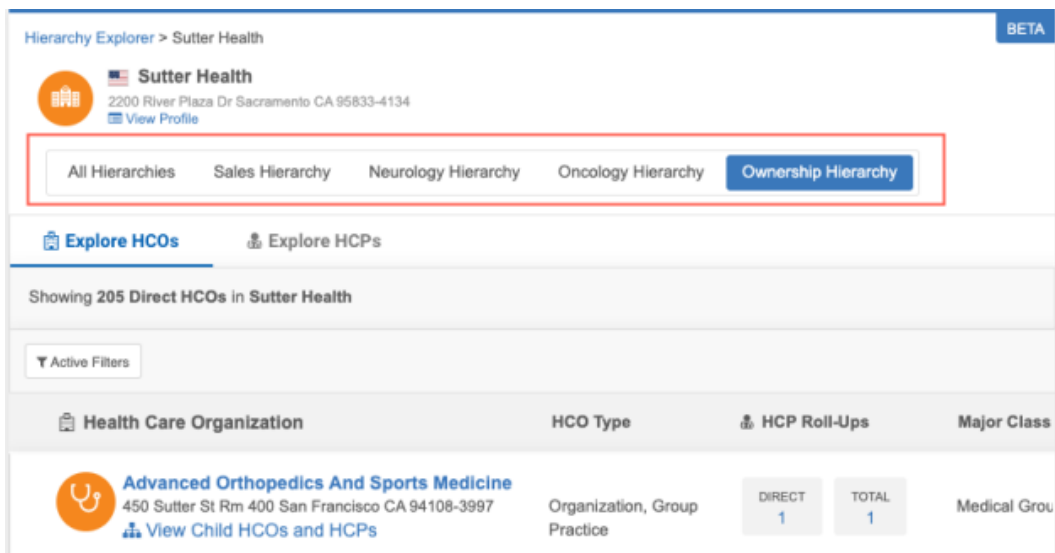
- **Health Systems** - HCOs in the immediate hierarchy. Hierarchy levels are separated by semi-colons (;). For example: *Health System A; Health System B; Health System C*.
- **Health System Veeva IDs** - The Veeva IDs of the health systems in the hierarchy. For example: *937932943268120161; 937932943268120169; 937932943268120173*.

HIERARCHY EXPLORER WIDGET ENHANCEMENTS

21R3.1

The Hierarchy Explorer is updated with the following enhancements:

- **Custom hierarchies** - You can now create hierarchies so you can visualize primary relationships for specific business purposes. For example, you might create a hierarchy for sales roll-ups or for specific therapeutic areas (Neurology or Oncology).





- **Parent organizations** - The **Explore HCPs** tab contains a powerful new column to display all affiliated HCOs for HCP in the health system. You can use this information to see other HCPs that work for the affiliated organization and the health system the HCO is affiliated with.

If an HCP has more than one affiliated HCO, click the **+ more** link to expand the column for more details.

Hierarchy Explorer > Sutter Health BETA

Sutter Health
 2200 River Plaza Dr Sacramento CA 95833-4134
[View Profile](#)

All Hierarchies | Sales Hierarchy | Neurology Hierarchy | Oncology Hierarchy | Ownership Hierarchy

Explore HCOs | **Explore HCPs**

Showing 132 Total HCPs in Sutter Health (129 directly connected HCPs)

Active Filters

Health Care Professionals	HCP Type	HCP Specialty	Medical Degree	Relationship Type	Parent Organizations
All Abil 75 El Real Palo Alto CA 94301-2302	Prescriber	Anesthesiology	Doctor of Medicine	Affiliation	Menlo Park Surgical Hospital (Sutter Health) + 2 more Hide
Parent Organization	HCO Type	HCP Roll-Ups	Relationship Type	Major Class of Trade	HCO Specialty
Sutter Health 2200 River Plaza Dr Sacramento CA 95833-4134 View Child HCOs and HCPs	Organization, Health System	DIRECT 129 TOTAL 132	Affiliation	Health Care System Administration	Unspecified specialty
California Pacific Medical Center Pacific Campus 2333 Buchanan St Bsrmt Level San Francisco CA 94115-1925 Health Care System: Sutter Health View Child HCOs and HCPs	Organization, CMS Teaching Hospital	DIRECT 7 TOTAL 7	CMS Hospital Claims	Hospitals	Multi Specialty Practice
Golden Gate Urology Webster 2100 Webster St Ste 222 San Francisco CA View Child HCOs and HCPs	Organization, Group Practice	DIRECT 1 TOTAL 1	Affiliation	Medical Group Outpatient	Urology, Vision Practice
Ale Chan 12 Mendo Ave Santa Rosa CA 95401-4330	Prescriber	Ophthalmology	Doctor of Medicine	Affiliation	Sutter Health + 1 more



- **Search audit** - Administrators can track the searches in the Hierarchy Explorer through the Search Audit Log. You can find search events using the Hierarchy Explorer Widget term in the **Search Origin** filter.

Search Audit History Export

Date range: 2022-01-09 To 2022-01-10 Search Origin: Hierarchy Explorer Widget X Get History Reset

Choose time period... ▾

TIMESTAMP	NETWORK USER NAME	SEARCH USER NAME	STATUS	FOUND	RETURNED	QUERY	ADDRESS QUERY	DATA TYPES	ORIGIN
2022-01-10 11:04:54 EST	shane.io@verteo.veevanetw...	shane.io@verteo.veevanetw...	SUCCESS	3	3	*		HCO,HCP	Hierarchy Explorer Widget
2022-01-10 11:04:54 EST	shane.io@verteo.veevanetw...	shane.io@verteo.veevanetw...	SUCCESS	3	3	*		HCO,HCP	Hierarchy Explorer Widget
2022-01-10 10:49:23 EST	shane.io@verteo.veevanetw...	shane.io@verteo.veevanetw...	SUCCESS	132	50	*		HCP	Hierarchy Explorer Widget
2022-01-10 10:49:15 EST	diego.ma@verteo.veevanetw...	diego.ma@verteo.veevanetw...	SUCCESS	205	50	*		HCO	Hierarchy Explorer Widget
2022-01-10 10:49:06 EST	dana.harris@verteo.veevane...	dana.harris@verteo.veevane...	SUCCESS	77	0	*		HCO	Hierarchy Explorer Widget

Availability

The Hierarchy Explorer widget is available in Beta version. If you are interested in being an early adopter, contact your Network representative.

Search and Profiles

NETWORK HASHTAGS

21R3.1

Hashtags display on record profiles and in search results to summarize important details. They can also be used in search queries to improve search accuracy. Network provides a set of predefined hashtags, but you can also create your own hashtags.

New hashtags

The following predefined hashtags are now available:

Hashtag	Entity	Country	Tooltip (EN)
#pharmacist	HCP	United States, Canada	HCP is a pharmacist in the US and Canada.
#phs	HCO	United States	HCO is a PHS Outpatient Organization.

These hashtags are enabled by default in your Network instance.

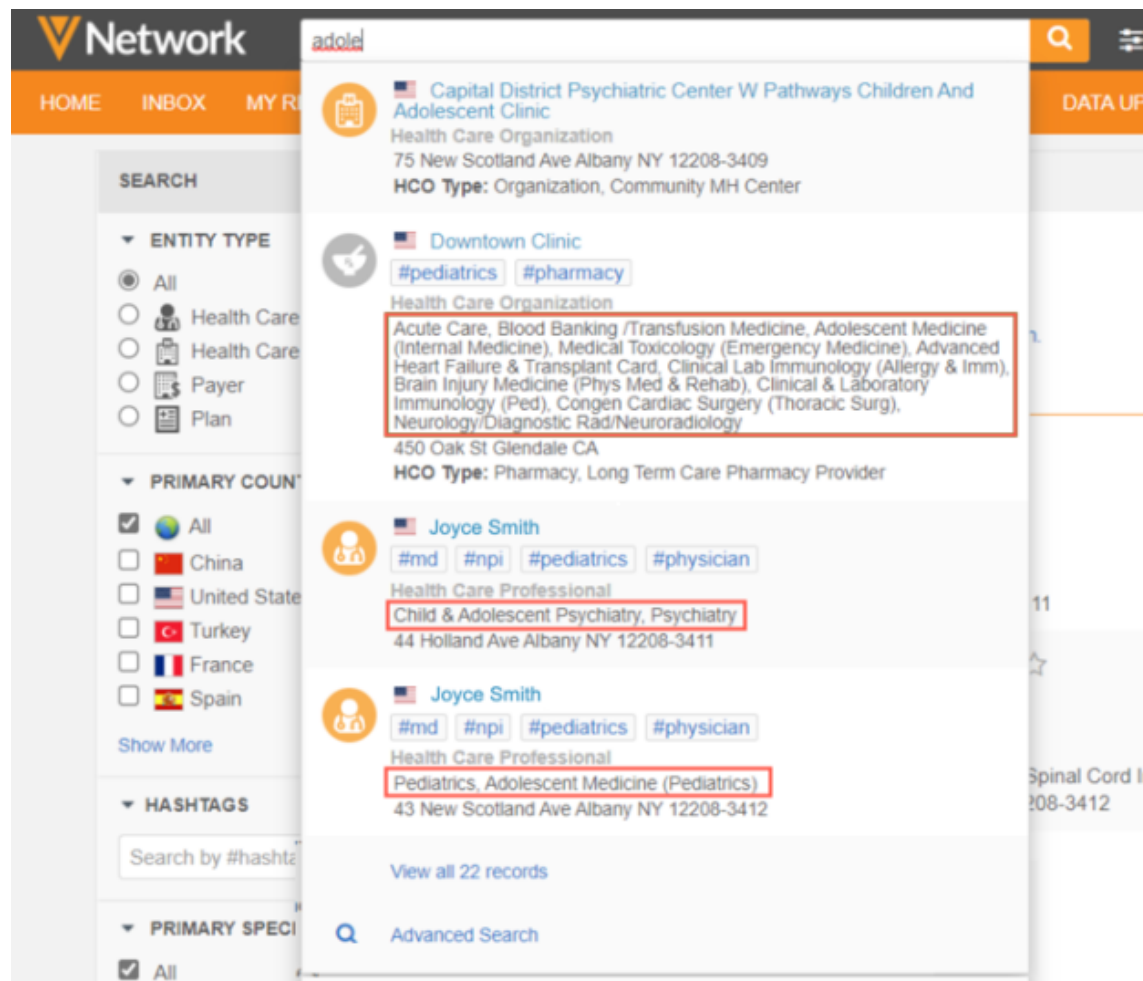


Search

SPECIALTY INFORMATION

22R1

Specialty information now displays in the partial results when you search for a record. Use this information to quickly identify the correct record.



This enhancement is enabled by default in your Network instance.



Profiles

PROFILE NOTES

21R3.1

You can now add notes to record profiles so other users can see the information. For example, data stewards can add a note to alert users when an HCP has taken a leave of absence, or to indicate an HCP's call time preference for data verification.

All users, except Standard users, can view, edit, and delete profile notes if they have access to the main object through their data visibility profile.

The screenshot shows a user profile for Jan Lin. The profile includes a header with the user's name, role (Prescriber), and contact information. Below this is a 'Primary Information' section with fields for Name, Vevea ID, and HCP Type. To the right of the primary information are sections for 'SAMPLE ELIGIBILITY' and 'HIERARCHY'. On the far right is a 'Profile Notes' section, which is currently visible. It contains three notes: a pinned note about maternity leave, a note about call time preferences, and a note about call verification. A 'Hide Notes' button is located at the top of the profile page.

This feature is enabled by default in your Network instance.

View notes

The **Profile Notes** section displays by default in the right panel on the Profile page, but you can choose to hide it.

Hide notes

- Click the **Hide Notes** button at the top of the Profile page. The **Profile Notes** section will be hidden.

Network remembers your preference and does not display the section until you open it again.

Create notes

Notes can be created for any valid record. They cannot be added to records with the following record states: Invalid, Deleted, or Merged_Into. If notes are added to a valid record and then the record state changes, the notes will still be visible; Merged_Into notes will be redirected to the surviving record.

Notes are specific to your Network instance. If you add notes to Veeva managed or third party managed records, your notes only display in your Network instance.



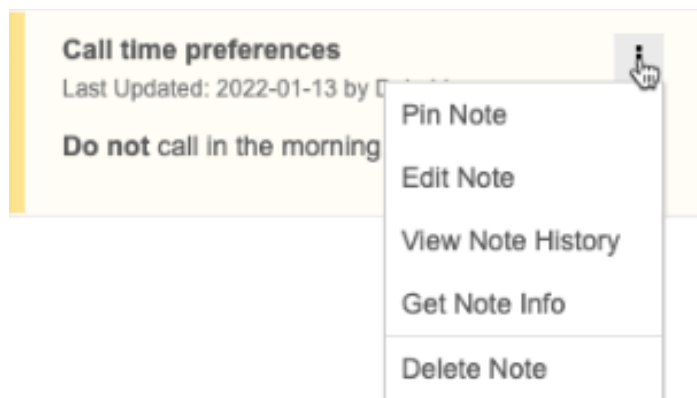
To create a note:

1. On any record profile, in the **Profile Notes** section, click **Add Note**.
 - If a record has no existing notes, click the **Add new note** link.
 - If there are existing notes, click the **Add Note** button
2. In the text box, type a title and the message.

3. Optionally, do any of the following to customize your note.
 - **Format the text** - Use bold, italics, or underline formatting. You can also change the color of the text and add a bullet or numbered list.
 - **Add attachments** - Add images to your message.
 - **Insert hyperlinks** - Include links to relevant websites.
 - **Change the note color** - Customize the background color of your note. The default color is blue.

Note options

After a note is created, an **Option** menu displays. Click the menu to view the available actions.

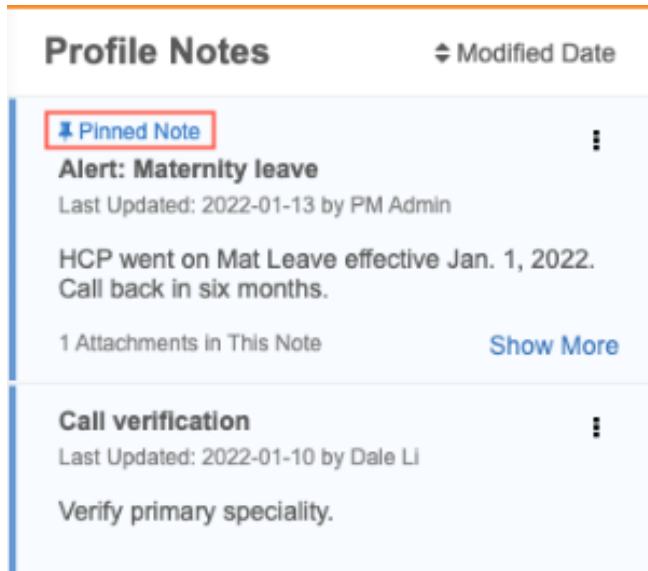


See the following sections for more details about each action.



Pin notes

Pin a note so it displays at the top of the **Profile Notes** section. By default, notes display by created/modified date. When you pin a note, that note displays above all of the sorted notes. Newest pinned notes display first.



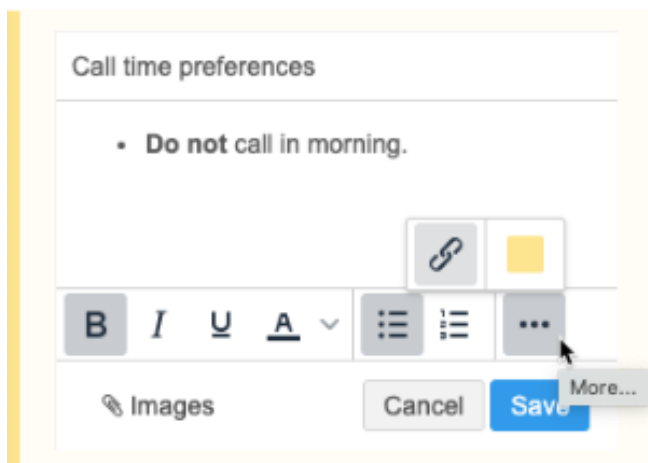
- To pin a note, click the **Options** menu on the note and select **Pin Note**.
- To unpin a note, click the **Options** menu on the note and select **Unpin Note**.

You can pin and unpin any note.

Edit notes

Click **Edit Note** to put the note in editing mode.

You can edit the title and message, add attachments (Images) and change the text formatting. Click the **More** button to add hyperlinks and change the note background color.



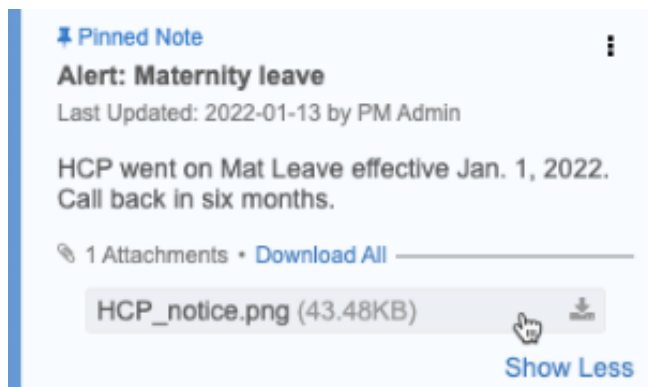



Add attachments

You can add attachments (images) to notes. This option is enabled by default in your Network instance.

When you view a note that includes attachments, you can do the following:

- **Preview** - Click the attachment name to preview the file.
- **Save** - Hover over a single attachment name and click the **Download** icon or click **Download All** to save all attachments on that note to your local computer.



- **Delete** - Click the **Options** menu on the note and select **Edit Note**. Hover over the attachment and click the **Delete**  icon.

If you delete an attachment, it is permanently removed from the database. The attachment name remains in the **Note History**.

Support for attachments

- **Attachment type** - Image files are supported (.jpg, .jpeg, and .png).
- **Maximum number** - Each note can contain a maximum of 10 attachments.
- **File size** - Each attachment can be a maximum file size of 5M.

Disable attachments

Administrators can disable the ability to use attachments. When the setting is disabled, users cannot add attachments to notes and attachments in existing notes do not display.

To disable attachment for notes:

1. In the Admin console, click **Settings > General Settings**.
2. In the **Feature Settings** section, find the **Notes** heading and clear the **Enable Attachment for Notes** setting.
3. **Save** your changes.





View note history

The Note History displays a snapshot of the note contents for each version. The version changes after existing content is changed and saved.

This behavior is different than a record's revision history which stores the difference between each version. You can use the details in the Note History to run queries on the Notes Revision History table in the SQL Query Editor to report on all changes made to a note. For more information, see the *Reporting on notes* section below.

Note History: Alert: Maternity leave		
VERSION	TIMESTAMP	USER
3	2022-01-13 18:33:08 GMT	PM Admin (pm.admin@verteo.com)
2	2022-01-13 18:23:44 GMT	PM Admin (pm.admin@verteo.com)
1	2022-01-13 18:13:11 GMT	PM Admin (pm.admin@verteo.com)

FIELD	VERSION 1	VERSION 2
Note Color		
Pinned Note	False	True
Note Title	Alert: Maternity leave	Alert: Maternity leave
Note Content	HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months.	HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months.
Attachments	image (12).png	image (12).png

The **Note History** can include the following details:

- Created date and time and user (Version 1)
- Modified date and time and user (Version 2 and greater)
- Changes to background color, pin state, title, content, and attachments.

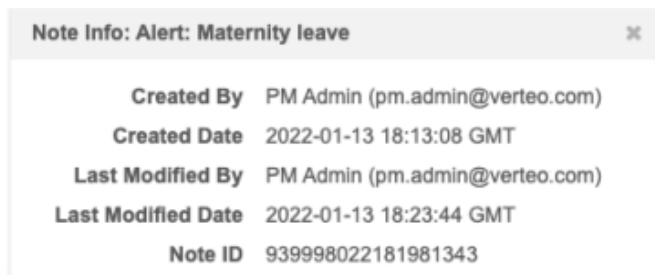
Note: When notes are deleted, their revision history is visible only in reporting. All users with access to the SQL Query Editor can run a report to get deleted notes content and revision history.



Note Info

All notes contain details about the user that created it, when it was created, and when it was last notified. Each note also has an ID. You can use this information in a query to run reports on notes.

To view these details, click the **Options** menu on the note and select **Get note info**.



Delete notes

Any user can delete a note that they have created or that was created by another user.

To delete a note:

1. On the note, click the **Options** menu and choose **Delete Note**.
2. In the confirmation pop-up, click **Delete**.

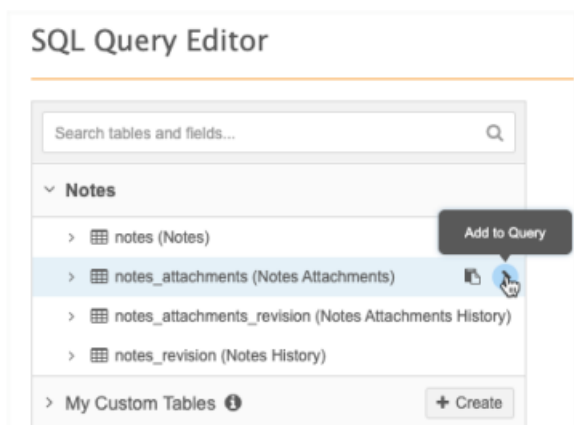
The note is permanently removed but its revision history is available in reporting. You can run a report to get deleted notes content and revision history.

Reporting on notes

Users can run SQL queries to extract details on notes by entity.

To run queries on profile notes:

1. In the SQL Query Editor, expand the **Notes** section. The tables and fields that are available for reporting are listed.
2. Hover over the table or field names to insert or copy them into your query.





Example queries

Example 1 - Notes content for a specific HCP

Use this query to report on all notes content for an HCP.

```
SELECT hcp.vid__v,  
       formatted_name__v,  
       hcp_status__v,  
       notes.id,  
       notes.content  
FROM   hcp  
LEFT JOIN notes  
      ON hcp.vid__v = notes.entity_id  
WHERE  hcp.vid__v = 243198766910276608
```

Results

The screenshot shows a query execution interface. At the top, there are tabs for 'Sample Queries' and 'My Recent Queries'. To the right, there are icons for 'Query Helper', 'Keywords', 'Operators', and 'Format Query'. The main area displays the SQL query from the previous block, with line numbers 1 through 10 on the left. Below the query, there is a green checkmark and the text 'Query Valid'. To the right of this, there is a checkbox labeled 'Include only VALID and UNDER_REVIEW records in results.' which is checked. Below this, there is a section titled 'Report Results (3 records)' with buttons for 'Download Report', 'Create Custom Table', and 'View Full Screen'. The results are displayed in a table with the following columns: VEEVA ID, NAME, STATUS, NOTE ID, and COMMENT.

VEEVA ID	NAME	STATUS	NOTE ID	COMMENT
243198766910276608	Jan Lin	Active	939998006974352543	<p>Do not call in the morning.</p>
243198766910276608	Jan Lin	Active	939998022181981343	<p>HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months.</p>
243198766910276608	Jan Lin	Active	939998024457522335	<p>Verify primary speciality.</p>



Example 2 - Identify Deleted Notes for an HCP

When notes are deleted, you can use reports to view details about the deleted content.

Example query

```
SELECT entity_id,
       revision_id,
       id,
       hcp.formatted_name__v,
       hcp.hcp_type__v,
       hcp.hcp_status__v,
       created_at,
       created_by,
       change_type
FROM notes_revision
left join hcp
on entity_id = vid__v
where change_type = 'DELETE' and hcp.vid__v = 243194480331588610
```

Results

The screenshot shows a query execution interface with the following components:

- Query Editor:** Contains the SQL query from the example above.
- Query Status:** A green checkmark indicates "Query Valid".
- Options:** A checkbox is checked for "Include only VALID and UNDER_REVIEW records in results."
- Report Results:** Shows 1 record.
- Table:**

ENTITY ID	REVISION ID	NOTE ID	NAME	HCP TYPE	STATUS	CREATED AT	CREATED BY	CHANGE TYPE
243194480331588610	940003704217799839	940002813082406047	Ed Piran	Prescriber	Active	2022-01-14 13:18:09	pm.admin@verteo.com	DELETE
- Footer:** "Displaying 1 to 1 of 1" and "Show 25" dropdown.



Example 3 - Report on all changes made to a note

Use reports to understand the differences between the versions of a note. The Note History displays a snapshot of the note contents for each version. The version changes after existing content is changed and saved. This behavior is different than a record's revision history which stores the difference between each version.

Example query

This query joins the **Note History** table with the **Notes** table.

```

SELECT
    notes_revision.id,
    notes_revision.revision_id,
    notes.content AS Current_Notes,
    notes_revision.content AS Previous_Notes,
    notes.created_at AS Created,
    notes_revision.created_at AS Modified,
    notes.created_by AS Created_By,
    notes_revision.created_by AS Modified_By,
    notes_revision.change_type
FROM
    notes_revision LEFT JOIN notes
        ON notes_revision.id = notes.id
WHERE
    id = 939998024457522335

```

Results

The screenshot shows a query execution interface with a SQL editor at the top containing the query from the previous block. Below the editor, a status bar indicates "Query Valid" and a checkbox for "Include only VALID and UNDER_REVIEW records in results." is checked. The results section is titled "Report Results (5 records)" and contains a table with the following data:

NOTE ID	REVISION ID	CURRENT_NOTES	PREVIOUS_NOTES	CREATE
939998024457522335	940032691616353439	<p>Verify primary speciality.</p> <p>hello this is me trying to edit after sorting</p> <p> </p>	<p>Verify primary speciality.</p> <p>Edit</p>	2022-01
939998024457522335	940032684834688159	<p>Verify primary speciality.</p> <p>hello this is me trying to edit after sorting</p> <p> </p>	<p>Verify primary speciality.</p> <p>edit</p>	2022-01
939998024457522335	940032679974407327	<p>Verify primary speciality.</p> <p>hello this is me trying to edit after sorting</p> <p> </p>	<p>Verify primary speciality.</p> <p>edit</p>	2022-01
939998024457522335	940032678423563423	<p>Verify primary speciality.</p> <p>hello this is me trying to edit after sorting</p> <p> </p>	<p>Verify primary speciality.</p> <p>edit</p>	2022-01
939998024457522335	940032677297589407	<p>Verify primary speciality.</p> <p>hello this is me trying to edit after sorting</p> <p> </p>	<p>Verify primary speciality.</p>	2022-01



Example 4 - Report on notes that have attachments

Use this query to report on the notes that currently have active attachments.

Example query

```
SELECT
    notes.entity_id,
    notes.id,
    notes.title,
    notes.content,
    notes_attachments.id,
    notes_attachments.filename
FROM
    notes INNER JOIN notes_attachments
        ON notes.id = notes_attachments.note_id
ORDER BY
    notes.entity_id,
    notes.id,
    notes_attachments.id
```

Results

Sample Queries
My Recent Queries
Query Helper: Keywords Operators Format Query

```
1 SELECT
2     notes.entity_id,
3     notes.id,
4     notes.title,
5     notes.content,
6     notes_attachments.id,
7     notes_attachments.filename
8 FROM
9     notes INNER JOIN notes_attachments
10        ON notes.id = notes_attachments.note_id
11 ORDER BY
12     notes.entity_id,
13     notes.id,
14     notes_attachments.id
```

✔ Query Valid
 Include only VALID and UNDER_REVIEW records in results. ⓘ

Report Results (8 records)
[Download Report](#)
[+ Create Custom Table](#)
[View Full Screen](#)

ENTITY ID	NOTE ID	TITLE	COMMENT	ATTACHMENT ID	ORIGINAL FILENAME
243154001430840322	940004598655487135	Supporting Notes	<p>Attachment contains verification notes</p>	940004598657322143	2022-01-14_17-05-22.png
243194480331588610	939998270359145631	Verification Documents	<p> HCP is valid</p> <p>See attachment</p>	939998270359342239	Dr Miranda_webmd.png
243198766910276608	939998022181981343	Alert: Maternity leave	<p>HCP went on Mat Leave Jan. 1, 2022</p>	940116168787102880	image (9).png
24321833143422597	939997111438609567	Call preferences	<p>See attachment</p>	939997111439068319	unnamed (5).png
24321833143422597	939997111438609567	Call preferences	<p>See attachment</p>	940021246936353951	2022-01-17_11-54-02.png
243223879743439872	940042277377739935	Verify for next call	<p>Medical degree</p> <p>See attachment</p>	940042277377739936	2022-01-21_08-47-02.png
243241076222067719	940116253825305759	Supporting notes	<p>Attachment for HCP</p>	940116253825305760	image (9).png
243243213412893697	940020058841549983	Alert: Leave of absence	<p>Sabbatical dates in attachment</p>	940020058841615519	unnamed (5).png



Displaying 1 to 8 of 8 Show 25 | 1 of 1 < >



Example 5 - Report on the history of notes attachments

Users can add and remove attachments from notes. In the **Note History** example below, you can see that a user has removed two attachments from this note. When attachments are deleted, they are permanently removed from the database, but their name remains in the **Note History**.

VERSION	TIMESTAMP	USER
7	2022-02-03 15:01:01 GMT	PM Admin (pm.admin@verteo.com)
6	2022-02-03 15:00:21 GMT	PM Admin (pm.admin@verteo.com)
5	2022-02-03 14:59:22 GMT	PM Admin (pm.admin@verteo.com)
4	2022-02-03 14:58:17 GMT	PM Admin (pm.admin@verteo.com)

FIELD	VERSION 6	VERSION 7
Note Color		
Pinned Note	True	True
Note Title	Alert: Maternity leave	Alert: Maternity leave
Note Content	HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months.	HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months.
Attachments	image (12).png image (9).png unnamed (8).png	image (9).png

Example query

Use this query to view the history of changes for attachments to notes.

```
SELECT
    notes.entity_id,
    notes.id,
    notes.title,
    notes.content,
    notes_attachments_revision.revision_id,
    notes_attachments_revision.id,
    notes_attachments_revision.filename,
    notes_attachments_revision.change_type
FROM
    notes LEFT OUTER JOIN notes_revision
        ON notes.id = notes_revision.id LEFT OUTER JOIN
notes_attachments_revision
        ON notes_revision.revision_id =
```



```

notes_attachments_revision.revision_id
ORDER BY
    notes.entity_id,
    notes.id,
    notes_attachments_revision.revision_id,
    notes_attachments_revision.id
    
```

Results

Query Valid Include only VALID and UNDER_REVIEW records in results

ENTITY ID	NOTE ID	TITLE	COMMENT	REVISION ID	ATTACHMENT ID	ORIGINAL_FILENAME	CHANGE_TYPE
243196799918276608	939998022181961343	Alert: Maternity leave	<g>HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. </g>	939998022430652607	939998022182046879	image (12).png	
243196799918276608	939998022181961343	Alert: Maternity leave	<g>HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. </g>	939998063902919639	939998022182046879	image (12).png	
243196799918276608	939998022181961343	Alert: Maternity leave	<g>HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. </g>	940096741151075467	939998022182046879	image (12).png	
243196799918276608	939998022181961343	Alert: Maternity leave	<g>HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. </g>	940116168799971807	939998022182046879	image (12).png	
243196799918276608	939998022181961343	Alert: Maternity leave	<g>HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. </g>	940116172671880351	939998022182046879	image (12).png	
243196799918276608	939998022181961343	Alert: Maternity leave	<g>HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. </g>	940116172671880351	940116198787102880	image (9).png	
243196799918276608	939998022181961343	Alert: Maternity leave	<g>HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. </g>	940116175304199327	939998022182046879	image (12).png	DELETE
243196799918276608	939998022181961343	Alert: Maternity leave	<g>HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. </g>	940116175304199327	940116198787102880	image (9).png	
243196799918276608	939998022181961343	Alert: Maternity leave	<g>HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. </g>	940116175304199327	940116172672011424	unnamed (8).png	DELETE

Merge considerations

Notes cannot be merged. When records are merged, the note from the losing record is reported to the winning record.

When records are unmerged, notes are not reported to the newly created record.

Anonymization

Notes (including their attachments) are deleted when the record is anonymized.

Network API

Notes are not supported in the Network API.



Audit

Administrators can track all notes activities (create, edit, delete) in the System Audit Log.

System Audit History

Date range: 2022-01-06 To: 2022-01-11 Object Types: ProfileNote X Properties: Select an option Get History Reset

Choose time period... ▾

Showing events for 2022-01-06 to 2022-01-11

EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE
939986289604955295	2022-01-11 16:29:23 GMT	leanh@verteo.com	entity[243241076222067719]...	Delete	ProfileNote		
939986289604955295	2022-01-11 16:29:23 GMT	leanh@verteo.com	entity[243241076222067719]...	Create	ProfileNote	color	("primary"-"#679
939986289604955295	2022-01-11 16:29:23 GMT	leanh@verteo.com	entity[243241076222067719]...	Create_ListProperty	ProfileNote	attachment	3054099861843
939986071872146591	2022-01-11 15:34:00 GMT	leanh@verteo.com	entity[243194480331588610]...	Edit	ProfileNote	isPinned	true
939986071872146591	2022-01-11 15:34:00 GMT	leanh@verteo.com	entity[243194480331588610]...	Edit	ProfileNote	pinTimestamp	1641915239117

Disable notes features and functions

Administrators can disable notes for their Network instance or disable the ability to add attachments to notes.

1. In the Admin console, click **Settings > General Settings**.
2. In the **Feature Settings** section, find the **Notes** heading.
 - To disable notes, clear the **Enable Notes in Profile Page** setting.
 - To disable the option to add attachments to notes, clear the **Enable Attachment for Notes** setting.
3. **Save** your changes.



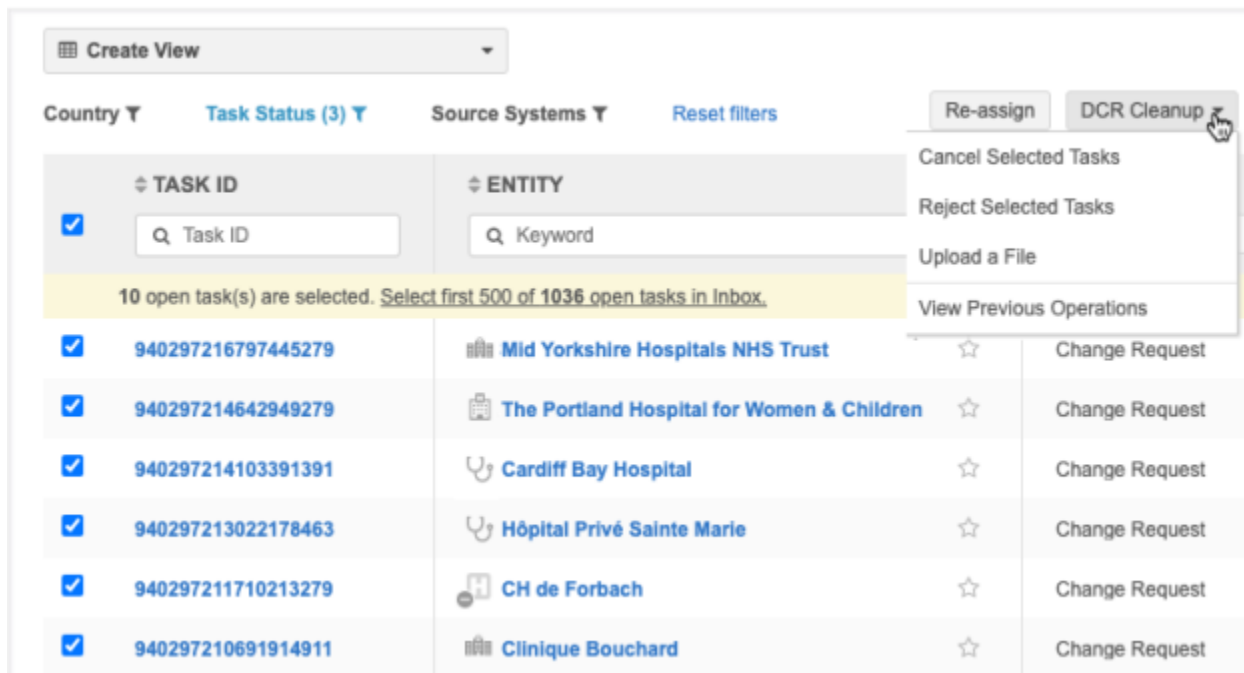
Inbox

DCR CLEANUP

22R1

Users can now cancel or reject tasks in bulk in the Inbox.

Tasks can be generated from internal processes or through integrations and need to be removed in bulk without reviewing each individual task. Previously, these tasks had to be rejected individually in the inbox or be rejected in bulk using the Network API. Users with the appropriate permission sets can now clean up these tasks directly from the Inbox.



This feature is available by default in your Network instance, but it does not display until Administrators create permission sets to provide access to users. Only users with access will see the feature in the Inbox.

For more information, see the "Permission Sets" topic in these *Release Notes*.

DCR bulk operations

Users with the appropriate permission sets will now see a **DCR Cleanup** list in the Inbox.

The list contains four options:

- **Reject Selected Tasks** - Select the tasks (limit of 500) to be rejected in bulk. Tasks should be rejected if they contain incorrect data. When tasks are rejected, all the fields are rejected, and a resolution note must be applied so users understand the reason the task was not accepted.
- **Cancel Selected Tasks** - Select the tasks (limit of 500) to be canceled in bulk. Tasks should be canceled if they are badly submitted DCRs; for example, they were not meant to be generated. This can happen through internal processes or integrations.



- **Upload a File** - Instead of selecting each task in the Inbox, you can run a bulk operation by uploading a file that contains a single column: **task IDs**.

This option gives you more flexibility for rejecting and canceling 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. You can also include more tasks by uploading a file (limit of 5000 tasks) instead of selecting them from the inbox (limit of 500 tasks).

- **View Previous Operations** - Displays the DCR Cleanup Operations page; the list of bulk reject or cancel operations that have been run in your Network instance.

The options are available based on your assigned permission sets and the selected tasks. For example, if no tasks are selected in the inbox, the **Reject Selected Tasks** and **Cancel Selected Tasks** options are not active.

For details about each option, see the sections below.

Supported tasks

You can cancel or reject 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.

Ignored tasks

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

- Assigned tasks - Tasks that are assigned to other users (Cancel/Reject Selected Tasks only)
- Pending master tasks - Tasks that are pending review by Veeva OpenData.
- Suspect match tasks
- Unsupported task types - Job warnings and failed jobs.
- Duplicate task IDs - The upload file contains duplicate tasks.
- Closed tasks - The upload file contains closed tasks.
- Invalid task IDs - The upload file contains tasks that are not DCRs.

Resolution notes for rejected tasks

Rejected task operations require a resolution note. One resolution note is applied to all tasks in the operation.

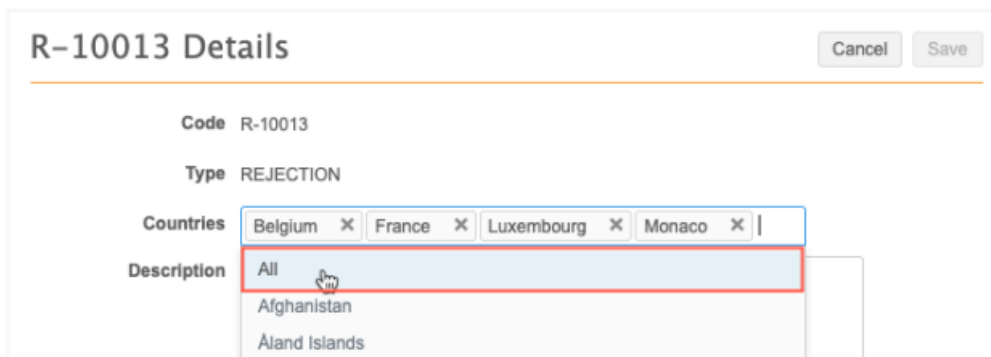
Before you begin rejecting tasks, Administrators or Data Managers should configure resolutions notes to support these bulk operations.



All countries

Resolution notes must apply to all countries because the tasks in each operation can be from multiple countries. Resolution notes for specific countries do not display for bulk reject operations.

- Go to **System Interfaces > Resolution Notes**. In each resolution note that could apply to bulk operations, remove the selected countries and choose **All**.



Custom resolution notes

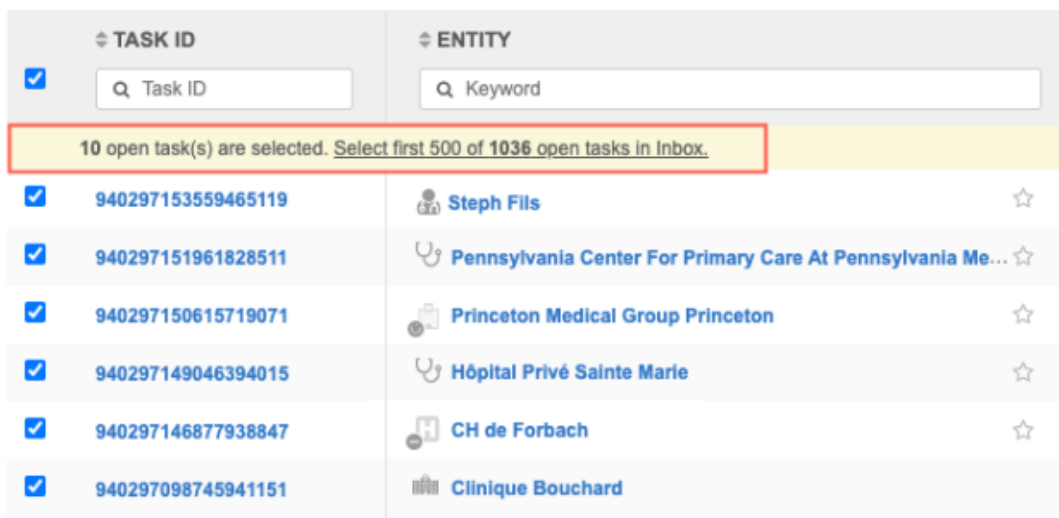
Existing resolution notes might not be applicable to tasks that are rejected in bulk. Create custom resolution notes that apply these operations and configure them for **All** countries.

Reject selected tasks

To reject tasks in bulk:

- In the Inbox, select the tasks to reject and click **DCR Cleanup > Reject 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.



Tip: For bulk rejections, include tasks that are being rejected for the same reason; one resolution note will be applied to all the tasks in the operation.



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

Inbox > Reject Tasks

Selected Tasks Summary

Cancel Next

1 Selected Tasks Summary 2 Resolution Notes

500
TASKS TO BE REJECTED

Health Care Professional (HCP)
TASKS

487
TOTAL

475
ADD REQUESTS

12
CHANGE REQUESTS

Health Care Organization (HCO)
TASKS

13
TOTAL

0
ADD REQUESTS

13
CHANGE REQUESTS

5
IGNORED TASKS

IGNORED TASKS REASON	# OF TASKS
Suspect Match Tasks	1
Unsupported Tasks Type	4

Ignored tasks

A count displays in this box if any of the tasks will be ignored in the operation because they cannot be rejected 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.
- **Unsupported Tasks Type** - Tasks that are Job Warnings or Failed Jobs.

Click **Next**.

- 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 rejecting the tasks.
 - **Language** - The language the resolution note will display in.The localized message will display in the **Resolution Notes** field.



Inbox » Reject Tasks

Resolution Notes

Cancel Back Run Operation

Selected Tasks Summary 2 Resolution Notes

Resolution notes will be applied to all tasks.

Code R-10004: Insufficient information to process the request. ...

Language French

Resolution Notes

Nous manquons d'informations pour traiter votre demande. Merci de nous fournir à minima le nom complet, l'adresse, la profession et/ou la spécialité et le téléphone du professionnel de santé / de l'établissement / du service

To continue, click **Run Operation**

4. In the **Confirm Reject Tasks** dialog, provide a reason for rejecting the tasks and then click **Yes, Reject Tasks**.

Confirm Reject Tasks

Are you sure you want to reject the tasks?

Reason *

Bad PDRs

Cancel Yes, Reject Tasks

The DCR Cleanup Operations page automatically opens and you can see from the message that the operation to reject the tasks has started. For information about this page, see the "DCR Cleanup Operations" section below.



Cancel selected tasks

To cancel tasks in bulk:

1. In the Inbox, select the tasks to cancel and click **DCR Cleanup > Cancel Selected Tasks**. A maximum of 500 tasks can be selected.

A summary page provides a count of add requests and change requests for each selected object and a total count of records that will be canceled in the operation.

Object Type	Total	Add Requests	Change Requests
Health Care Professional (HCP) TASKS	4	0	4
Health Care Organization (HCO) TASKS	6	0	6

10 TASKS TO BE CANCELLED

0 IGNORED TASKS

Ignored tasks

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

- **Assigned tasks** - The task is assigned to a data steward.
 - **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
2. Click **Run Operation** to cancel the selected tasks.
 3. In the **Confirm Cancel Tasks** dialog, provide a reason for canceling the tasks and then click **Yes, Cancel Tasks**.



Confirm Cancel Tasks ✕

Are you sure you want to cancel the tasks?

Reason (required):

Cancel wrong PDRs

Cancel
Yes, Cancel Tasks

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

For information about this page, see the "DCR Cleanup Operations" section below.

Upload a file

Uploading a file gives you more flexibility for canceling and rejecting 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 reject or cancel.
- **Task limit** - A maximum of 500 tasks can be included in each operation.
- **File Size** - Files can be up to 30MB.
- **Reason for rejections** - Include tasks that are being rejected for the same reason; one resolution note will be applied to all the tasks rejected in the operation.

Example file

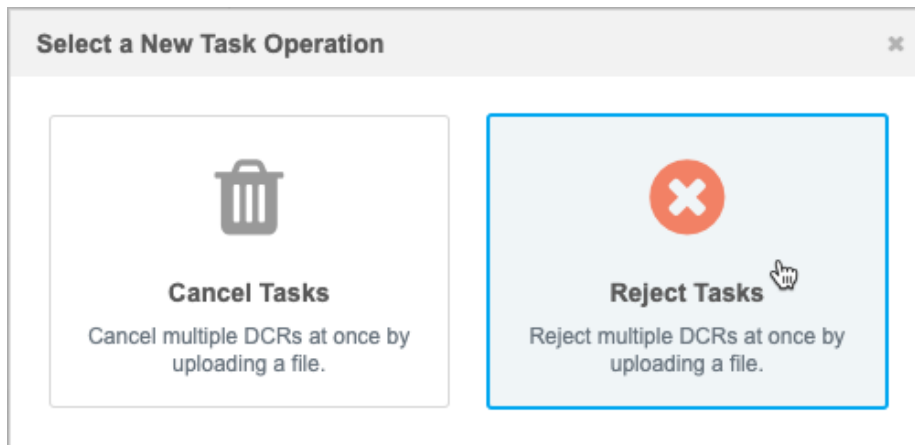
task_id
940297216797445279
940297214642949279
940297214103391391
940297213022178463

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 reject or cancel 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 **Cancel Tasks** or **Reject Tasks**.

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

3. On Step 1 (**Reject Tasks** or **Cancel 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. Step 2 (**File Summary**) contains the details of the file that was uploaded and the records that will be rejected or canceled. A total count of the tasks for each object and counts for each task type display.

IGNORED TASKS REASON	# OF TASKS
Duplicate Task IDs	2
Closed Tasks	1
Unsupported Tasks Type	3



Ignored tasks

A count displays in this box if any of the tasks will not be rejected or canceled 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.

If this is a Reject Task operation, click **Next**.

If this is a Cancel Tasks operation, click **Run Operation** to start the cancel operation.

5. (*Reject Tasks only*) On Step 3 (**Resolution Notes**), define the resolution note that will be applied to all of the rejected tasks.

- **Code** - The reason for rejecting the tasks.
- **Language** - The language the resolution note will display in.

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

Click **Run Operation**.



DCR Cleanup Operations

The DCR Cleanup Operations page lists all of the cancel and reject bulk operations that have been run in your Network instance.

This page automatically opens whenever you submit an operation so you can monitor its progress. You can also open the page using the **DCR Cleanup** list - click **View Previous Operations**.

Users with the appropriate permission sets can see all bulk operations that have been run by all users. Click **Only show operations run by me** to filter the page for your operations.

OPERATION ID	START DATE	TASK OPERATION	RUN BY	REASON	DURATION	STATUS
940296986299862175	2022-03-07 13:23:38 GMT	Reject Tasks via File Upload	data.manager@verteo.com	bad PDRs	2 minutes	Completed
940296811053911199	2022-03-07 12:39:04 GMT	Cancel Tasks via Task Selection	data.manager@verteo.com		2 minutes	Completed
940262252286577823	2022-03-01 10:10:19 GMT	Reject Tasks via Task Selection	data.manager@verteo.com		a few seconds	Completed
940235046658444447	2022-02-24 14:51:34 GMT	Cancel Tasks via Task Selection	data.manager@verteo.com		a few seconds	Completed
940235042772225183	2022-02-24 14:50:35 GMT	Cancel Tasks via Task Selection	data.manager@verteo.com		a few seconds	Completed
940234965035650207	2022-02-24 14:30:49 GMT	Cancel Tasks via Task Selection	data.manager@verteo.com		a few seconds	Completed

For each operation, you can see the following details:

- **Operation ID** - An ID assigned to the operation. Click the link to open the Operation Details page.
- **Start Date** - The date and time that the operation began. This column can be sorted.
- **Task Operation** - The type of task (Cancel, Reject) and how the records were defined (selected or uploaded). This column can be sorted.
- **Run By** - The user that created the operation.
- **Reason** - The description of the reason that the user defined.
- **Duration** - The amount of time that the operation took to run.
- **Status** - The operation status. If it is running, a progress bar displays until it completes.

Click **New Operation** to upload a file for a new task Cancel Tasks or Reject Task operation.

Operation details

Click the **Operation ID** link to view the details.



Inbox > DCR Cleanup Operations > Operation Details (ID: 94031467773667487)

Operation Details (ID: 94031467773667487)

Operation Results

349
 TASKS CANCELLED

	ADD REQUEST	CHANGE REQUEST
HCP	349	0

0
 TASK ERRORS

Operation Overview

Operation ID: 94031467773667487

Status: ✔ Completed

Start Time: 2022-03-10 16:22:48 GMT

Duration: a minute

Run By: pm.manager@verteo.com

Task Operation: Cancel Tasks via File Upload

File Uploaded: demoReject.csv

Operation Summary

FILE DETAILS

demoReject.csv
FILE UPLOADED

✔ VALID
TASK ID FIELD

499 RECORDS
READ

349
 TASKS SUBMITTED

Health Care Professional (HCP)
TASKS

349
TOTAL

349
ADD REQUESTS

0
CHANGE REQUESTS

150
 IGNORED TASKS

IGNORED TASKS REASON	# OF TASKS
Closed Tasks	150

[Download Ignored Tasks](#)

The sections contain the following details:

- **Operation results** - Displays counts of the tasks that were rejected or canceled during the operation. If errors occurred during the operation, a count of the errors and details about the errors display. You can download the task errors for further review.
- **Operation Overview** - Displays details about the operation itself: the operation ID, status, start time, user that ran the operation, the file that was uploaded (if applicable, and so on).
- **Operation Summary** - The original summary of the operation when the user created the operation.



If tasks were ignored in the operation, click **Download Ignored Tasks** to download a .csv file and investigate the details.

Example file

```

● ● ● cleanup_process_errors_94031467773667487.csv
"Task Id","Error Type"
"940297098766847135","Invalid state:CLOSED"
"940297098767174815","Invalid state:CLOSED"
"940297098688662687","Invalid state:CLOSED"
"940297098688859295","Invalid state:CLOSED"
"940297098663038111","Invalid state:CLOSED"
"940297098727328927","Invalid state:CLOSED"
"940297098689055903","Invalid state:CLOSED"
"940297098689055904","Invalid state:CLOSED"
"940297098727787679","Invalid state:CLOSED"
"940297098662644895","Invalid state:CLOSED"

```

Audit

Administrators can track the DCR cleanup operations that have been run in the Network instance in the System Audit History log.

Tip: To easily find the DCR Cleanup operations, filter the table on the **DCRCleanup** object type.

System Audit History Export

Date range: 2022-03-01 To: 2022-03-07 Object Types: DCRCleanup X Properties: Select an option Get History Reset

Choose time period... ▾

EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE
940296986305367199	2022-03-07 13:23:38 GMT	data.manager@verteo.com	DCRCleanup	Start	DCRCleanup	process_id	940296986299862175
940296811059809439	2022-03-07 12:39:04 GMT	data.manager@verteo.com	DCRCleanup	Start	DCRCleanup	process_id	940296811053911199
940262252293000351	2022-03-01 10:10:19 GMT	data.manager@verteo.com	DCRCleanup	Start	DCRCleanup	job_ids	940262252286577823

Displaying 1 to 3 of 3

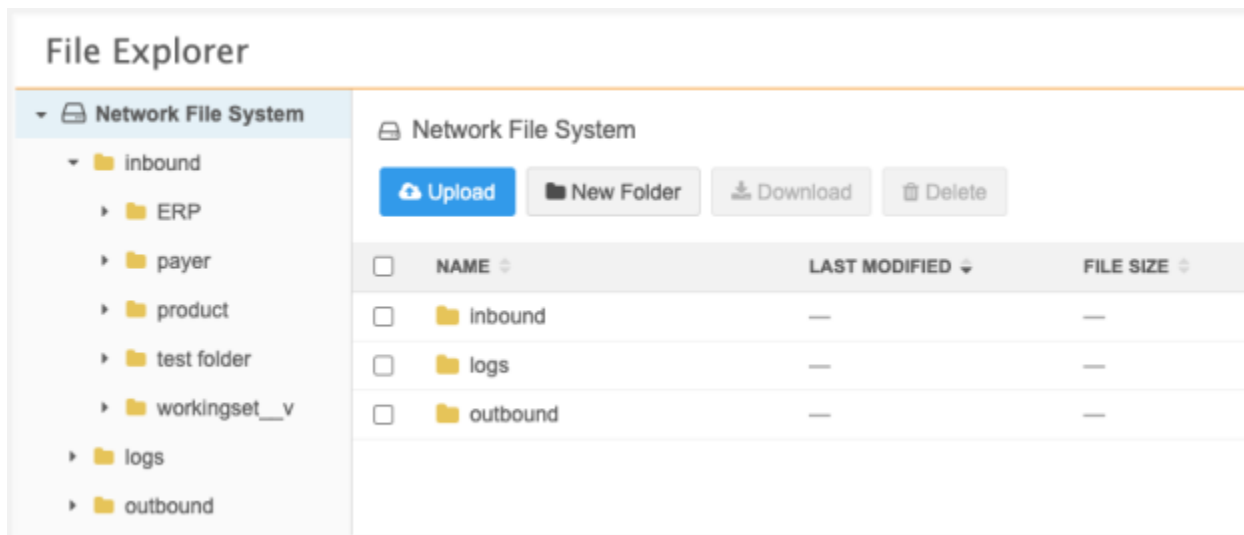


File explorer

NETWORK FILE SYSTEM

22R1

Use the File Explorer to see and manage your file system directly within Network. Previously, access to the file system was available using a third party tool only. Users that have FTP access can upload and download files in the File Explorer so they can be used by subscription jobs.



This feature is enabled by default in your Network instance.

Administrators can disable the feature for their Network instance using the **File Explorer** setting in the **General Settings**. Disabling the File Explorer does not impact your Network file system in third party FTP applications.

View your file system

- On the Network menu bar, click **File Explorer**.

Tip: File Explorer can also be accessed from the Overview page and the Admin console (Administrators and Data Managers only).

The directories that display depend on the **FTP Access** settings that administrators have set in your user account. You can manage the contents in the directories that you have access to.

If you have access to all directories, the home directory typically contains the following:

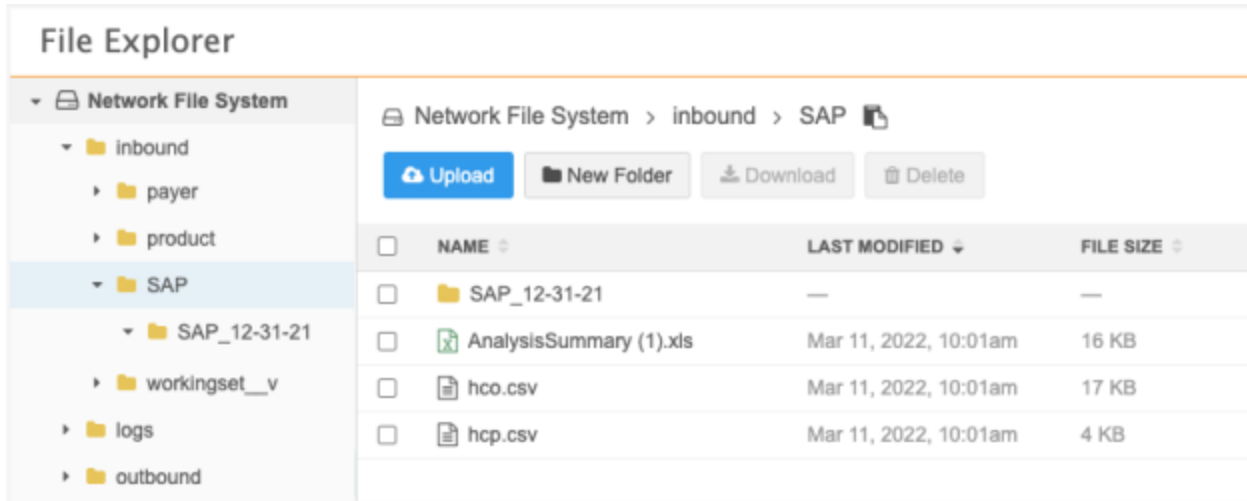
- **inbound** - This directory contains folders from source systems. Files that will be loaded into Network using source subscriptions or used for data maintenance jobs are contained in this directory.
- **outbound** - This directory contains folders that will be exported to downstream systems (for example, files from target subscriptions).



Navigate your file system

Use the panel on the left to navigate the file structure. Click the folders to expand them to see the hierarchy. The folders at the top of the main panel can also be used to navigate the file system

Folders always display at the top of the directory and are listed in alphabetical order by default. The files are listed by last modified time by default.

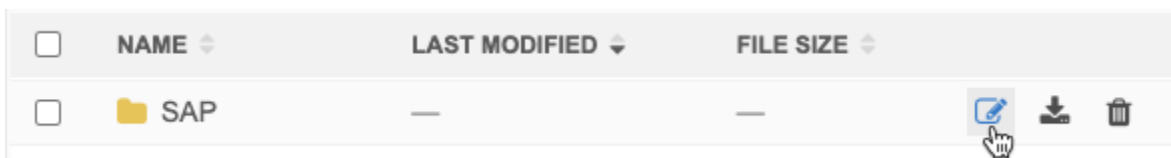


Manage the directories

- **Open folder** - Click a folder to open it. The current directory is highlighted in the left panel and its folders and files display in the main panel.

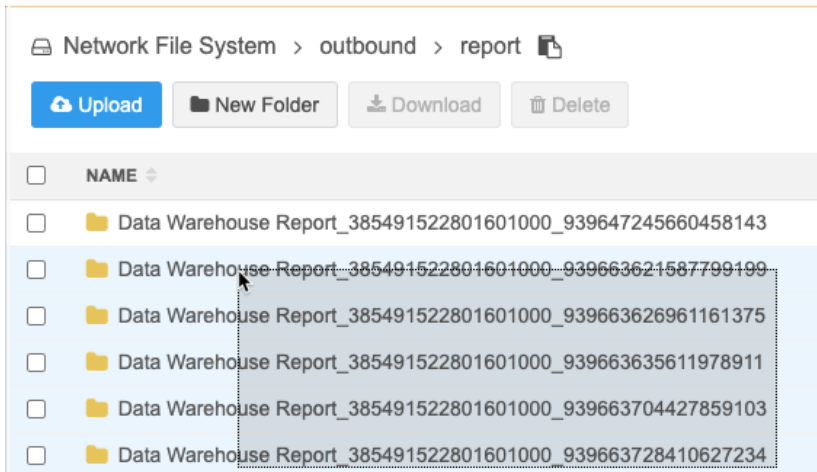
The first 1000 items (folders and/or files) display. To view all items, download the folder or use a third-party FTP application.

- **Copy file path** - The file path of the current directory displays in an active breadcrumb at the top of the main panel. Click the **Copy** icon to copy the path into a feature configuration; for example, into a source subscription so the job knows where to retrieve the files to load into Network.
- **Create folders** - Click **New Folder** in the current directory. In the **New Folder** dialog, type a name and click **Create New Folder**. The folder name must be unique. The folder is added to the current directory in alphabetical order.
- **Sort directory** - Sort the directory using the **Name**, **Last Modified**, and **File Size** columns. By default, files are sorted in folders by **Last Modified** time.
- **Rename items** - Hover over the file or folder and click the **Edit** icon to rename it. A folder can be renamed only if it is empty.

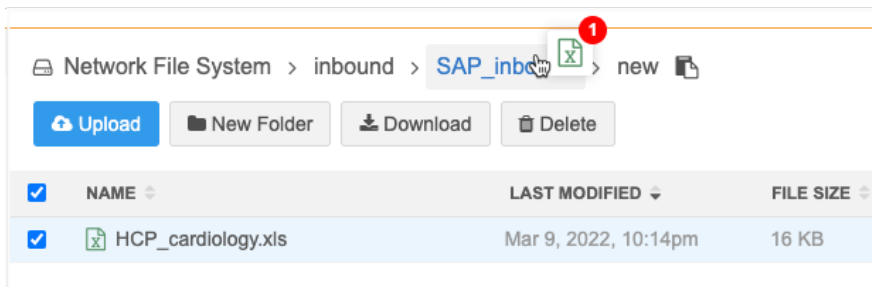




- **Select items** - Use the checkboxes to select single or multiple items or drag your mouse cursor to select multiple items.



- **Move folders and files** - Drag and drop files and folders into other folders. Select a file or folder and drag it into a folder in the left panel, main panel, or the active breadcrumb at the top of the main panel. Multiple files and folders can be moved at the same time. A folder can be moved only if it is empty.



Download files and folders

Locally download selected files or folders into a compressed file.

1. From the main panel, select one or more files and folders to download.
2. Click **Download**.

The compressed file is downloaded to your local computer with the following naming convention: `export_{date_time}.zip`. For example, `export_2022-03-07T22.52.55.zip`.

Tip: To download an individual file, hover over the file and click the **Download** icon.

Individual folders and multiple files/folders are downloaded as a compressed file. Individual files are not compressed when downloaded.

Note: When folders are downloaded, the number of items might be higher than what you see in File Explorer because only the first 1000 items (folders and/or files) display in each folder.

Tip: To download or upload large files (for example, files over 2GB), consider using a third party FTP application.



Upload files and folders

Select local files and folders to upload to the Network file system.

1. Click **Upload** to browse or drag and drop the items from your local directory.
Multiple items can be uploaded at the same time.
2. In the **Third Party Data** dialog, confirm that the items do not contain third party data. If the items contain third party data, confirm that an agreement allows you to load the data into Network. These answers are tracked in the audit logs.

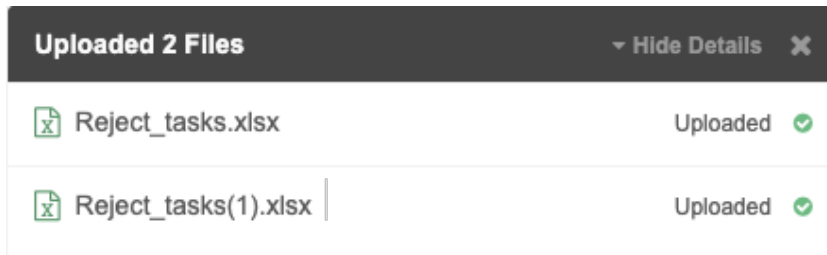
If you upload a new version of an item or an item with the same name, decide to keep both items or overwrite the current item. If you keep both items, the item that you most recently uploaded will be appended with a number; for example, `Reject_tasks(1).xlsx`.

Note: There are no space limitations for your Network file system in the File Explorer or in a third party FTP application. This is existing behavior.

Cancel uploads and downloads

When items are uploading, a pop-up at the bottom of the panel displays a count of the items uploading and their progress. To cancel the upload, click the **x** icon on the pop-up.

If the upload is canceled, any items that are still in progress are canceled.



When items are being compressed to download, a pop-up at the bottom of the panel displays a count of the compressed files and their progress. To cancel the download, click the **x** icon on the pop-up.

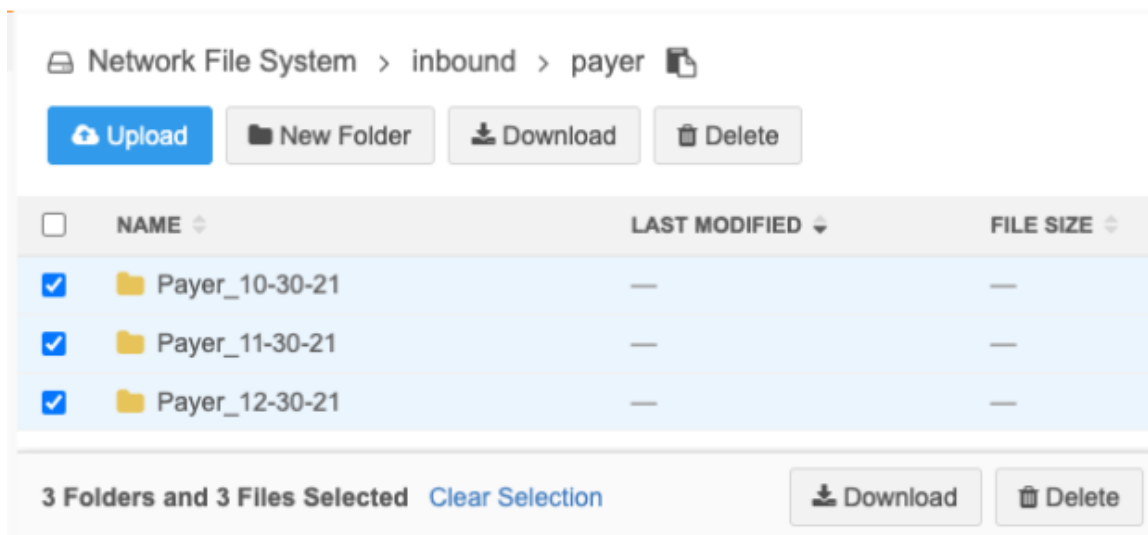
If the download is canceled, any items that are still in progress are canceled.



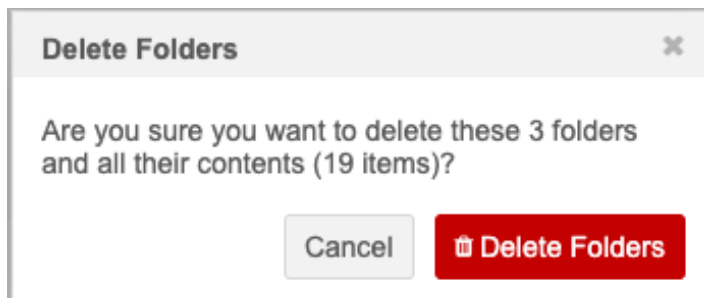
Delete files and folders

Users are responsible for managing their Network file system. Network does not automatically delete or archive your files and folders.

1. Select the files or folders to delete.



2. A pop-up displays to confirm your action. If multiple folders and files are selected, a count of the affected folders and files display.



3. Click **Delete Folders** to confirm the removal.

The following folders cannot be deleted:

- inbound
- inbound/workingset__v
- outbound
- outbound/changesets__v



Supported characters

The following UTF-8 characters are supported for files and folders in the Network File System.

a-z, A-Z	letters (in any supported language)
0-9	numbers
	single spaces (consecutive spaces are <i>not</i> supported)
,	comma
.	period
:	colon
;	semi-colon
'	apostrophe
-	hyphen
_	underscore
!	exclamation point
?	question mark
()	open and close parenthesis
+	plus sign
=	equal sign
*	asterisk
\$	dollar sign
&	ampersand
@	at sign

If existing folder or file names contain characters that are not supported, they can be opened (folders) or downloaded only. However, no actions are supported for existing folder or file names that contain the slash (\) or backslash (/) characters. Folder and file names that begin with a period (.) are hidden. Users can still access these items through third party FTP applications.

Audit

Administrators can track the changes to the Network file system in the System Audit History.

The following activities are tracked:

- Downloads
- Uploads (including third party data confirmation)
- Creating folders
- Renaming items
- Moving items
- Deleting items



Tip: To easily find the File Explorer operations, filter the table on the **FileSystemExplorer** object type.

System Audit History Export

Date range: 2022-03-07 To: 2022-03-08
 Object Types: FileSystemExplorer X Properties: Select an option
 [Get History] [Reset]

Choose time period... ▾

EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE
940300673633225887	2022-03-08 05:01:22 GMT	admin@verteo.com	/inbound/folder/Reject_tasks....	Renaming	FileSystemExplorer	name	/inbound/folder
940300559309278367	2022-03-08 04:32:18 GMT	admin@verteo.com	/inbound/folder	Upload	FileSystemExplorer		{ "filename": "Reject_tasks.dl...
940300559296695455	2022-03-08 04:32:18 GMT	admin@verteo.com	/inbound/folder/Reject_tasks....	Delete	FileSystemExplorer		
940300404608863391	2022-03-08 03:52:57 GMT	admin@verteo.com	/outbound/report	Download	FileSystemExplorer		{ "objects_downloaded": ["lo...
940300091175799967	2022-03-08 02:33:15 GMT	admin@verteo.com	/outbound	Download	FileSystemExplorer		{ "objects_downloaded": ["lo...

Data model

COUNTRY SUPPORT

22R1

Veeva OpenData data models have been added for the following countries/regions:

- Hong Kong (HK)
- Macao (MO)
- Taiwan (TW)

The data models are based on the Other Countries (ZZ) data model. The data model also includes additional fields so they are consistent with the China OpenData data model.

The activated reference codes are based on the reference codes that are activated for Other Countries (ZZ), along with additional reference codes supported by the China OpenData team.

Localization

Chinese (zh) and Traditional Chinese (zh-TW) will be used for the Network UI, data model fields, and reference data.

NEW LANGUAGE

22R1

Albanian (SQ) is now supported as a reference language. It is not supported for Network data model fields or for the Network UI.

This enhancement is enabled in your Network instance by default.

Select the language for reference codes

To view reference codes in this language:

1. On the Network menu bar, click **My Profile**.
2. In the **Settings** section, expand the **Language** list and select **Albanian**.
3. **Apply** your changes.



FORMATTED NAME

22R1

HCO and HCP name formatting rules have been added for the following regions:

- Hong Kong (HK)
- Macao (MO)
- Taiwan (TW)

This enhancement is enabled by default in your Network instance.

HCO Name calculation

The formatted name for HCOs uses the `corporate_name__v` field.

HCP Name calculation

HCP names will use the `full_name__v` field.

If the `full_name__v` field is blank, the formatted name will be calculated using these Veeva fields in the following order:

```
last_name__v + first_name__v
```

The formatted name displays on the profile page.

FIELD UPDATES AND MERGES

21R3.1

The dataflow functionality for record updates and merges now considers how standard (`__v`) and custom (`__c`) fields are managed.

Fields can be managed locally, managed by Veeva OpenData, or managed by a third party data provider. Previously, data could be lost when updates or merges occurred because the process was unaware of the field management. For example, if you do not subscribe to field-level OpenData subscriptions (Email, HIN, NCPDP, GeoSubdivision, or CIP), those standard (`__v`) fields can be used for local data. When a record was merged in Veeva OpenData, any local data in those fields could be lost when the updates came down to your Network instance. These enhancements ensure that the update and merge logic respects the management of the field data.

Additionally, the merge logic will now treat NULL and EMPTY fields as the same in customer instances.

These enhancements are enabled in your Network instance by default.

Supported activities

These process enhancements are supported in the following activities:

- source subscriptions
- OpenData subscriptions
- OpenData ad hoc download jobs
- merges



Null and non-empty fields

In customer instances, NULL and EMPTY fields will be treated as the same. NON-EMPTY fields will prevail over NULL fields during survivorship.

Example

The merge loser has a NON-EMPTY field. The winning record has a NULL value for the field and its source has an equal or higher rank in survivorship. The field value on the winning record will be the value from the merge loser.

Match

DEFAULT MATCH RULES FOR EUROPEAN COUNTRIES

21R3.1

New default match rules for HCPs and HCOs have been added for the `change_request` subscription. This is an internal subscription that is used to process all add and change requests through the Network UI or API.

Countries

The new match rules are applied to all of the countries supported by Veeva OpenData in Europe:

- Albania (AL)
- Andorra (AD)
- Armenia (AM)
- Austria (AT)
- Azerbaijan (AZ)
- Bahrain (BH)
- Belgium (BE)
- Belarus (BY)
- Bosnia and Herzegovina (BA)
- Bulgaria (BG)
- Croatia (HR)
- Czech Republic (CZ)
- Denmark (DK)
- Estonia (EE)
- Finland (FI)
- France (FR)
- Georgia (GE)
- Germany (DE)
- Great Britain/United Kingdom (GB)
- Greece (GR)
- Hungary (HU)
- Iceland (IS)
- Ireland (IE)
- Italy (IT)
- Kazakhstan (KZ)
- Kyrgyzstan (KG)
- Kuwait (KW)
- Latvia (LV)
- Lebanon (LB)
- Liechtenstein (LI)
- Lithuania (LT)
- Luxembourg (LU)
- Moldova (MD)
- Monaco (MC)
- Montenegro (ME)
- Netherlands (NL)
- North Macedonia (MK)
- Norway (NO)
- Oman (OM)
- Poland (PL)
- Portugal (PT)
- Qatar (QA)
- Romania (RO)
- Russia (RU)
- Saudi Arabia (SA)
- Serbia (RS)
- Slovenia (SI)
- Slovakia (SK)
- Spain (ES)
- Sweden (SE)
- Switzerland (CH)
- Tajikistan (TJ)
- Turkey (TR)
- Turkmenistan (TM)
- Ukraine (UA)
- United Arab Emirates (AE)
- Uzbekistan (UZ)

These changes will be applied to all Network instances by default.



DEFAULT MATCH RULES FOR SINGAPORE

21R3.1

New default match rules for HCPs and HCOs in Singapore have been added for all subscriptions.

Subscriptions

- **Ad hoc match** - To view or edit the rules, go to **System Interfaces > Ad Hoc Match Configuration**.
- **Change request** - This is an internal subscription used for processing all add and change requests submitted through the Network UI and API.
- **Source subscriptions** - To view or edit the rules, go to **System Interfaces > Source subscriptions**. The rules will apply to all new subscriptions and existing subscriptions that use the default match rules.

These changes will be applied to the subscriptions in your Network instance that still use default match rules. If you have overridden the default match rules for a subscription, your changes will be preserved.

Source subscriptions

FIELD MAPPING IMPROVEMENTS

22R1

In 21R3.1, the source subscription wizard was updated to provide suggestions for mapping your sample file column headers to Network data model fields. The suggestions were based on the column headers in the sample file. Now, the contents of the sample file are also reviewed to provide more helpful suggestions.

This enhancement is enabled by default in your Network instance.

Example

Upload a file with a column named **ID** that contains NPI numbers. The field contents are reviewed and the wizard can suggest the `NPI_num__v` field based on those contents. Previously, the field suggestion was based only on the **ID** column name. Because there are many ID fields in the Network data model, a helpful field suggestion would not be provided.

FIELD MAPPING SUGGESTIONS

21R3.1


The source subscription wizard now provides Network field suggestions to map to the column headers in your sample file. Suggestions are available for fields for all object types.

This enhancement is enabled by default in your Network instance.




Mapping fields









When you arrive at the last step of the wizard, the **Field Mappings** step, the columns from the sample file display in a table for each object tab.








The incoming column header names are analyzed to see if they map to Network fields. The columns that have field suggestions are highlighted in green rows and display a **Wand**  icon beside the column name.

Field Mapping




Health Care Professional (HCP) 
Address (ADDRESS)

Fields: All fields

FILE COLUMN	VEEVA NETWORK FIELD	SAMPLE FILE D/ SAMPLE	
INVESTIGATORID 	<input type="text" value="Select a Network field"/>	0c1415c1-9298-	10037d
LASTNAME 	<input type="text" value="Last Name (last_name__v) X"/>	Wendt	Lagguith
FIRSTNAME 	<input type="text" value="First Name (first_name__v) X"/>	Robin	Ren
MIDDLENAME 	<input type="text" value="Middle Name (middle_name__v) X"/>		
 SALUTATION 	<input type="text" value="Prefix (prefix__v) X"/>		
TITLE	<input type="text" value="Select a Network field"/>		
GENDER  	<input type="text" value="Gender (gender__v) X"/>	F	M
STATUS	<input type="text" value="Select a Network field"/>		

Legend  Primary Key  Foreign Key  Foreign Key Related Object  Mapped Field  Network Suggestion  Reference Field  Custom Key

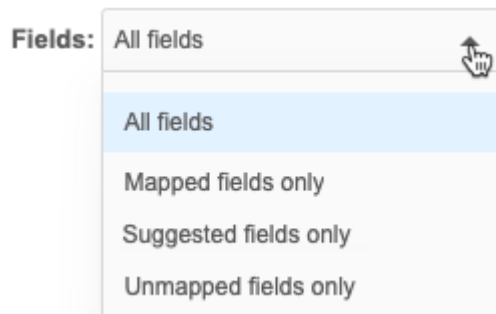
Review the suggestion and decide to use, change, or remove the suggestion.

- **Use** - No action required. The row remains highlighted and the **Wand**  icon remains.
- **Change** - If you change the suggested field, the row remains highlighted and a green checkmark  displays.
- **Remove** - If you remove the suggested field and do not select another field, the row highlighting and the **Wand**  icon are removed.



Filter the table

To filter the table of fields so you only see the field suggestions, expand the **Fields** list and choose **Suggested fields only**. The **File Column** will be filtered to only show the rows that include the suggested mappings.



About suggested fields

- Suggested fields are based on the country and object that you defined earlier in the wizard.
- Suggested fields cannot be reused. For example, `first_name__v` cannot be suggested for use in multiple fields.
- When multiple suggested field mappings are found, the highest ranked match is chosen. For example, if the column header is **Country** and it matches to Network's `country__v` and `birth_country__v` fields, the `country__v` field displays because it is the highest ranked match.
- Standard fields (`__v`) and custom fields (`__c`) are treated equally as potential matches to column headers.
- System fields and disabled fields are not supported for field suggestions.
- If you define your own column headers in the wizard, field mapping suggestions are not provided.
- Only useful suggestions display; fields are only suggested if they are good matches.



Data export

TRANSFORMATION QUERIES

22R1

Network can now transform data so you can export it in the format that downstream systems can easily receive. Previously, you might have used a third-party ETL tool to post-process Network data. Now, you can create SQL queries to transform the data within Network before exporting it using a target subscription.

This feature is enabled by default in your Network instance.

Examples of data transformations

Use transformation queries to post-process data. For example:

- **Replace values**

Example: If a limited relationship in Network is invalidated, the foreign key fields are set to -1, but that value is not supported in Veeva CRM. Replace -1 with #N/A for the CRM Upsert Connector.

- **Denormalize a complex data model**

Example: Flatten a multi-level product hierarchy. The data is transformed to a single .csv file that your downstream system can easily digest.

- **Join additional fields**

Example: Join additional fields from any table in Network reporting, including lookup tables or custom tables

- **Define field values based on certain conditions**

- **Rename fields**

- **Concatenate or split fields**

How transformation queries work

Use queries to:

- Transform files exported by target subscriptions
- Extract data only from the reporting database
- Join datasets exported by target subscriptions with datasets from the reporting database.

Note: If you use the query to read from the reporting database, all applicable records from all countries and with all record states will be included in the output file; data visibility profiles are not considered and records are not filtered by their record state.



Query process overview

Transformation queries are SQL based (SELECT statements). Test them in the SQL Query Editor and then link them to target subscriptions.

1. Write and test your query in the SQL Query Editor (**Reports**).
2. Create a transformation query (**System Interfaces**). Copy and paste the tested SQL query into the transformation query configuration.
3. Link the transformation query to a target subscription.

Note: If you are using the query to extract data only from the reporting database, the query is still linked to a target subscription. The export settings on the target subscription determine if data is extracted from the Network main database or not.

When the target subscription runs, the following process occurs:

- **Extract data** - According to the configured export settings on the target subscription, Network extracts the data from the main database. If the target subscription is configured to export no entities, then no data is extracted from the main database at all.
- **Apply queries** - Inject transformation queries into the job.
- **Generate files**- The files exported by the target subscription and/or the query output files are packaged and placed on the Network FTP server.

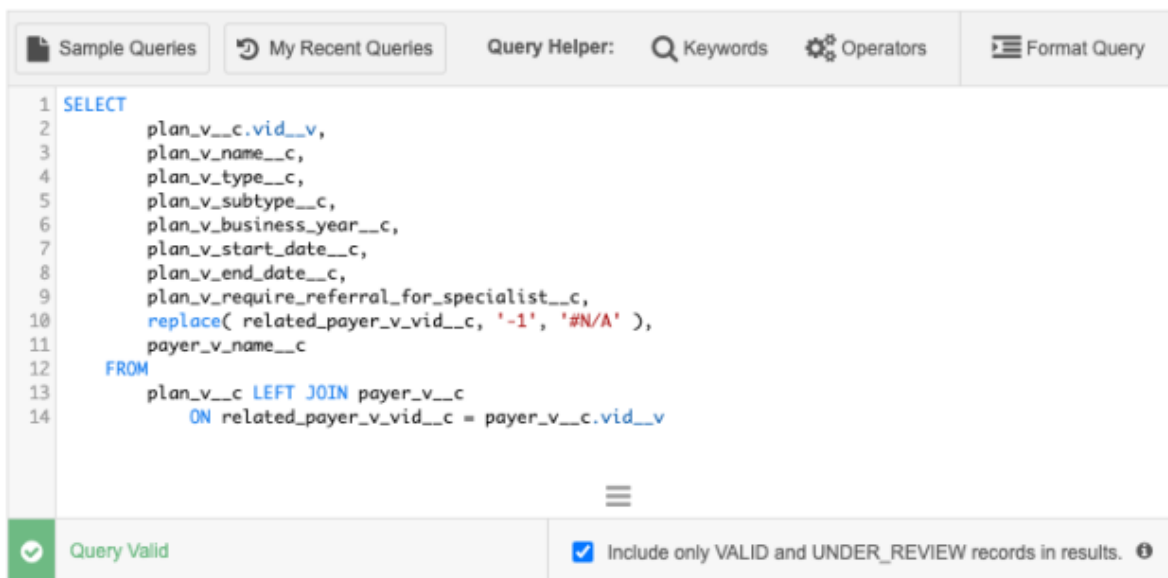
Create a transformation query

Prerequisite

Write and test your query in the SQL Query Editor to ensure that it is valid and performs the data transformation as expected.

Example

This query joins the payer and plan tables. It also replaces the foreign key value on the related_player__v relationships from -1 to #N/A.





The SQL Query Editor validates the SQL syntax and field names that are used in the query.

Adding the transformation query

1. In the Admin console, click **System Interfaces > Transformation Queries**.
2. Click **Add Query**

New Transformation Query

Cancel
Save

▼ Details

Name

Description

▼ Transformation Query

▼ HOW TO CREATE AND TEST A TRANSFORMATION QUERY?

Step 1 • Write and test your data transformation query in the [SQL Query Editor](#).

Step 2 • After your transformation query is tested, copy and paste your query into the text area below.

- Add the '_.csv' suffix to your table names so the transformation query can read the exported files. Example: Change 'hcp' to 'hcp_.csv'.
- Save your transformation query.

Step 3 • Link the saved transformation query to a target subscription by adding it to the 'Transformation Queries' section on the target subscription page.

For more instructions on setting up transformation queries, refer to the [online help](#).

🔔 Query Tips

- All record states are included in the results. Use a WHERE clause to filter on record state, if required (example: WHERE record_state__v = 'VALID').
- Column names must be unique in the query results.
- The LIMIT clause is not supported in transformation queries.

Save output of transformation query as: .csv Format Query

```

1 SELECT
2   plan_v__c___.csv.vid__v,
3   plan_v_name__c,
4   plan_v_type__c,
5   plan_v_subtype__c,
6   plan_v_business_year__c,
7   plan_v_start_date__c,
8   plan_v_end_date__c,
9   plan_v_require_referral_for_specialist__c,
10  replace(related_payer_v__vid__c, '-1', '#N/A'),
11  payer_v_name__c
12 FROM
13  plan_v__c___.csv left join payer_v__c on related_payer_v__vid__c = payer_v__c.vid__v
                
```

3. Type a **Name** and **Description**.
4. Paste your tested SQL query into the query box.



Query considerations

- **Table names** - Add the `__csv` extension to the table names if you want to post-process the files exported by the target subscription. To read directly from the table in the reporting database, do not add the extension.

Examples

To read from the table in the reporting database, do not add the `__csv` extension to the tables in your query.

```
SELECT vid__v, first_name__v || ' ' || last_name__v from hcp
```

To access files exported by the target subscription when the transformation query runs, add the `__csv` extension to the tables in your query.

```
SELECT vid__v, first_name__v || ' ' || last_name__v from hcp__csv
```

- **Unique column names** - The exported results require unique column names. Identical column names are valid in the SQL Query Editor for reports but must be changed here so the transformation query can be saved.
- **Record state** - All record states are included in the results if the transformation query reads directly from the table in the reporting database. You can use a `WHERE` clause to filter records; for example, to only include valid records in the results, add `WHERE record_state__v = VALID` to your query.

Target subscriptions can be configured to consider record state. This means if the transformation query reads from a file exported by the target subscription, the data might already be filtered by record state depending on your subscription settings.
- **Number and date fields** - When transformation queries process data that is exported by the target subscription, all fields are internally treated as `varchar` fields. So, if your transformation query is intended to aggregate numbers or to do calculations on number or data fields, use the `CAST` function to convert the data type from `varchar` to the correct data type. This prevents issues because the export file processing uses `varchar` as the data type. For more information about `CAST`, see [SQL functions](#) in the *Veeva Network Online Help*.
- **LIMIT clause** - This `LIMIT` clause is not supported on the transformation query. If you want to limit the number of rows returned, wrap another query around the query that has the `LIMIT` clause.



Example: `LIMIT` clause not supported on the transformation query.

```
SELECT
    vid__v AS vid,
    first_name__v || ' ' || last_name__v AS name,
    alternate_first_name__v || ' ' || alternate_last_name__v
AS altname
FROM
    hcp__csv LIMIT 10
```

Example: `LIMIT` clause supported when it is wrapped within another query.

```
SELECT * FROM ( SELECT
    vid__v AS vid,
    first_name__v || ' ' || last_name__v AS name,
    alternate_first_name__v || ' ' || alternate_last_name__v
AS altname
FROM
    hcp__csv LIMIT 10
)
```

5. Type a name for the output file. The file name is automatically appended with `.csv`.

File name support:

- can contain numbers (0-9), letters (a-z, A-Z), and underscore (`_`) characters.
- must begin with a letter or underscore (`_`)
- cannot contain more than 100 characters
- cannot be any SQL keyword
- cannot be `reference.csv`

6. **Save** your query.

When the transformation query is saved, Network validates the query; for example, to ensure that column names are unique, to check if the query contains the `LIMIT` clause, or if the table names and output files are valid. If warnings display, fix the issues and save your changes.



Saved transformation queries

After you save a transformation query, it is listed on the main page. Each query row contains the name, description, and the modified and created dates by user.

NAME	DESCRIPTION	MODIFIED DATE	CREATED DATE	
Plans_and_Payer	Plans joined with their payer	2022-02-21 09:39:13 Admin, PM	2022-02-21 09:39:13 Admin, PM	
Concatenate_Indications	List aggregate (sorted alphabetically) all indications per product	2022-02-18 06:03:38 Admin, PM	2022-02-18 04:51:48 Admin, PM	
Flatten_Product_Hierarchy	Joining products with brand and package configurations	2022-02-18 07:35:44 Admin, PM	2022-02-18 06:29:32 Admin, PM	
Join_Products_on_Compound	Join product table on identical compound + ingredients	2022-02-21 09:29:10 Admin, PM	2022-02-21 09:29:10 Admin, PM	

Delete transformation queries

If the query is no longer needed or was created by mistake, click the **Delete** icon to remove it from your Network instance.

The dialog displays any linked subscriptions . Click **Delete** to confirm.

Confirm: Delete Transformation Query ✕

HCPname is used by the following subscriptions:

NAME	TYPE
Plan_Export	Target Subscription

Are you sure you want to delete this transformation query?

When a query is deleted, any related target subscriptions are also updated to remove the link to the query.

Edit transformation queries

Click the transformation query to open it and view the details or make changes. All the fields, except the **Code** (used for exporting configurations) can be edited.

The **Subscriptions** section displays any target subscriptions that use that transformation query.



▼ Subscriptions		
This transformation query is used by the following subscriptions:		
NAME ▲	TYPE	STATUS
Plan_Export	Target Subscription	✓ Enabled

Configure target subscriptions to export files

After the transformation query is created, add it to a target subscription so you can post-process the exported files.

Create or edit a target subscription

1. In the Admin console, click **System Interfaces > Target Subscriptions**.
2. Open an existing subscription or click **Add Subscription** to create a new one.
3. **Details** section
 - Type a **Name** and **Description** for the subscription.
 - **Type** - Choose **Data**. Transformation queries are not supported for subscriptions that export DCRs.
 - **System** - Choose the source system.
 - **Status** - The subscription is enabled by default.
4. **General Export Options** section
 - **Targeted Record Options** - Use the settings to define the extent of the data export. Use the **Record State** setting to filter the records if you want to export only Valid and Under Review records. You could have also added a record state filter to your transformation query.
 - **Hierarchy** - To avoid exporting unwanted records, select **Apply Export Options to the target records related entities**.

Note: The **Targeted Record Options** and **Hierarchy** sections do not apply if you are extracting data from the reporting database only. These sections will be removed from the configuration if you choose the **Export None** option in the **File & Field Selection** section.

- **Reference Data** - Choose to **Include Reference Data Files**.

Tip: If you include reference data, there is an internal table called `reference__csv` that you can use in your transformation query to look up reference labels.

- **File Format** - Define how you want the export file to be formatted.
- **Export Locations** - Choose to export the file to an FTP path or to cloud storage.

For detailed information about the settings in these sections see the [Add a target subscription](#) topic in the *Veeva Network Online Help*.



5. File & Field Selection section

This section is updated to support transformation queries that export data from the reporting database only.

The following options are now available for objects that are enabled in your Network instance:

- **Select Which Objects and Fields to Export** - Selected by default in new target subscriptions. When you select this option, you can choose to export all, some, or no fields for each object.

The screenshot shows the 'File & Field Selection' configuration panel. Under 'Export Options', the radio button for 'Select Which Objects and Fields to Export' is selected. Below this, there are several dropdown menus for different objects: 'Health Care Organization', 'Health Care Professional', 'Payer', 'Plan', 'Address', and 'License'. The 'Health Care Organization' dropdown is open, showing a search bar and four options: 'Do Not Export', 'Export All Fields', 'Export Some Fields', and 'Do Not Export'. The 'Export All Fields' option is highlighted with a mouse cursor.


- **Export All Objects and Field** - All fields are exported for all objects. The lists beside each object are inactive.
- **Export None** - No files will be exported from the Network main database. Choose this option if you are extracting data from the reporting database only. The lists beside each object are inactive.

The screenshot shows the 'File & Field Selection' configuration panel. Under 'Export Options', the radio button for 'Export None' is selected. Below this, there are several dropdown menus for different objects: 'Health Care Organization', 'Health Care Professional', 'Payer', 'Plan', 'Address', and 'License'. All dropdown menus are set to 'Do Not Export' and are inactive.

If you choose **Export None**, the **Targeted Record Options** and **Hierarchy** sections in **General Export Options** are immediately removed from the configuration because they no longer apply.




6. **Object Export Options** - For each object, choose to export **All Records** or **Select Records**. If you choose to export select records, define the filters for the records.
7. **Transformation Queries** section - Click **Add Query** to add a transformation query to the subscription.

You can apply multiple queries to each subscription. The queries will always run in sequence as they are listed in the subscription. Change the order of the queries using the **Handle**  icon.

Transformation Queries

Select data transformation queries to be applied to this target subscription below.
 Can't find a transformation query? [Create a New Transformation Query](#)

QUERY	DESCRIPTION	OUTPUT FILE	
Plans_and_Payer	Plans joined with their payer	plans_payer.csv	View Query 

[+ Add Query](#)

8. **Job Trigger Configuration** - Optionally add a schedule and any emails or jobs that should be triggered for this subscription.
9. **Save** your changes.

Data Flow View

After you save a target subscription, a new **Data Flow View** is added to the **Details** section to visualize all of the steps of the job, including the input and output files.

export_payer_plan Details
[Export by VID](#) [Clone](#) [Start Job](#) [Cancel](#) [Save](#)

Details


Name

Code

Type

System

Data Flow View

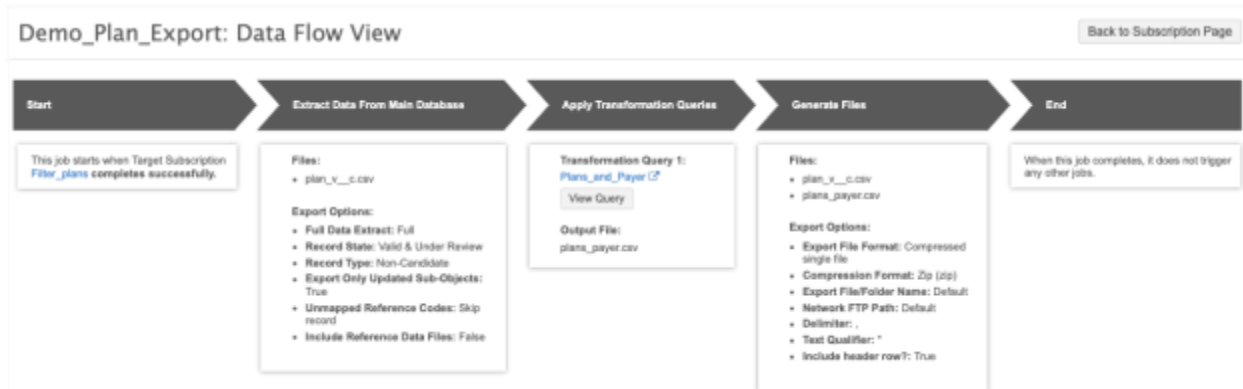




Click the **Data Flow View** thumbnail to open the view.

These stages of the job are defined:

- **Start** - Indicates if the job has been triggered by another job.
- **Extra Data From Main Database** - An overview of the files and settings that are defined in the target subscription. If the job is configured to extract data only from the reporting database, no files display.
- **Apply Transformation Queries** - Details about each query that is applied to the subscription. If there are multiple queries, they are listed in the order that they run. Click the query name to open the transformation query. Click **View Query** to see the query. This step does not display if transformation queries are not applied.
- **Generate File** - The output files, their format, and exported location. This includes any files exported by the target subscription as well as any query output files.
- **Export to Cloud Storage** - Links to the Amazon S3 bucket that the files are exported to. This step does not display if files are not exported to cloud storage.
- **End** - Indicates if this job triggers email notification or another job.



To return to the job configuration, click **Back to Subscription Page**.

Unsaved changes

If you have made changes to the target subscription configuration, the **Data Flow View** does not reflect those changes until the subscription is saved. A message displays if you open the view before saving the subscription.

Note: Transformation queries and the Data Flow View do not apply to target subscriptions that export DCRs.



Job details

After a target subscription completes, the Job Details page displays a **Transformation Queries** section if one or more queries was applied to the job.

The details include the query name and description, the output file and the number of records that were returned by the transformation query. If multiple transformation queries were applied, they display in the sequence that they ran.

Click **View Query** to display a snapshot of the query that was applied when this job ran. It might be different than the query that is currently saved in Network. Viewing the query as it was at run-time can help you to troubleshoot any issues that might have occurred.

▼ Transformation Queries					
SEQUENCE	QUERY	DESCRIPTION	OUTPUT FILE	NUMBER OF RECORDS	
1	Plans_and_Payer	Plans joined with their payer	plans_payer.csv	7	View Query

Job errors

When a target subscription runs with a transformation query that lead to a runtime error because of an invalid or incorrect SQL statement, the job will fail and an error is logged to help you to troubleshoot.

For example, if a transformation query created for HCPs is applied to a target subscription for exporting HCOs, a run-time error will occur.

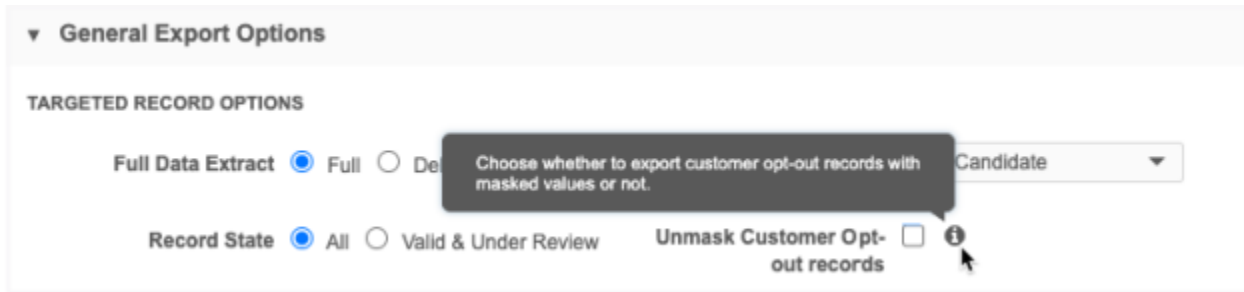
▼ Job Error Log			
EXTERNAL ID	STAGE	RULE	MESSAGE
0	VdmStageStage	transformationquery	Invalid transformation query HCPname__c, parse error: Unknown table hcp__csv

Considerations for opted out HCPs

Opted out HCPs are masked when they are queried through the SQL Query Editor (**Reports**), because data visibility profiles are applied to Network Reporting.

When opted out HCPs are retrieved from the reporting database through a transformation query, they are not masked. Data visibility profiles are not applied to transformation queries because target subscriptions run under system user permissions.

There is a target subscription setting to mask/unmask opted out records during export. This means if a transformation query processes opt outs exported by the target subscription, they can be masked depending on that export setting.



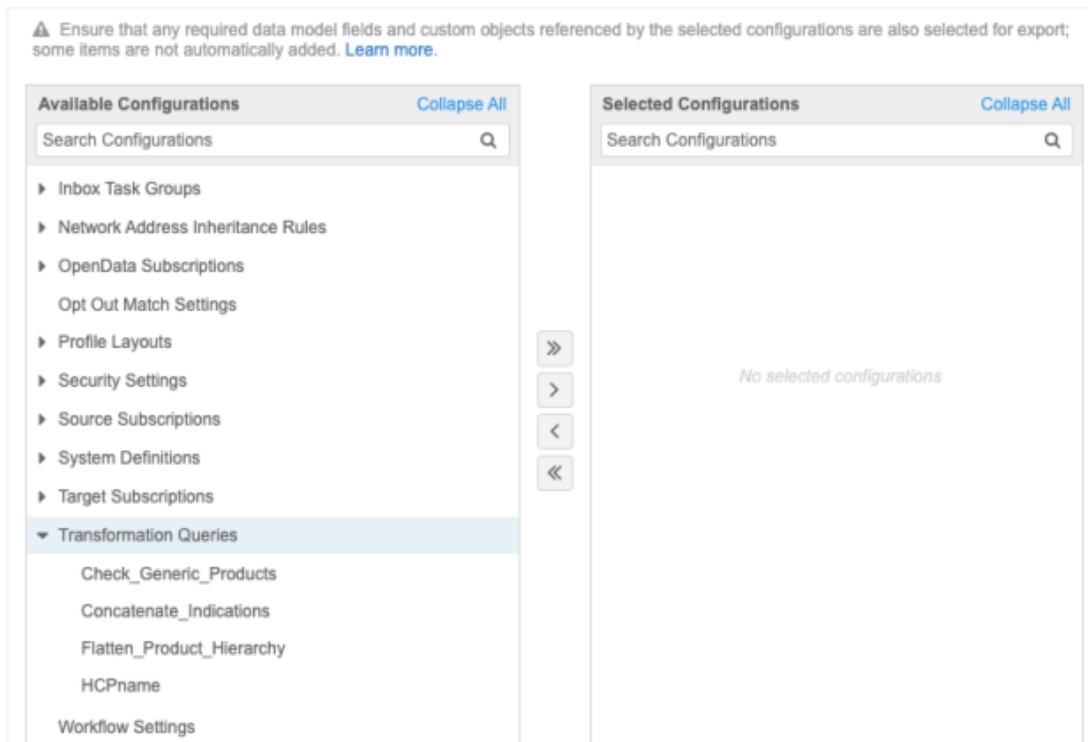
If transformation queries retrieve opted out records directly from the reporting database, then they are never masked; the target subscription setting does not apply.

To avoid data privacy issues when you need to transform opted out HCPs, export them using the target subscription with masking enabled. You can then define a transformation query that post-processes the masked HCPs exported by the target subscription.

Exporting configurations

Administrators can move transformation queries to target environments using export packages (**Settings > Configuration Export**). For example, you might create and test transformation queries in your Sandbox instance and then move them to your Production instance.

When you create a package, a new category has been created for **Transformation Queries**. Expand the category and choose the queries that you want to add to the package.





Users

PERMISSION SETS

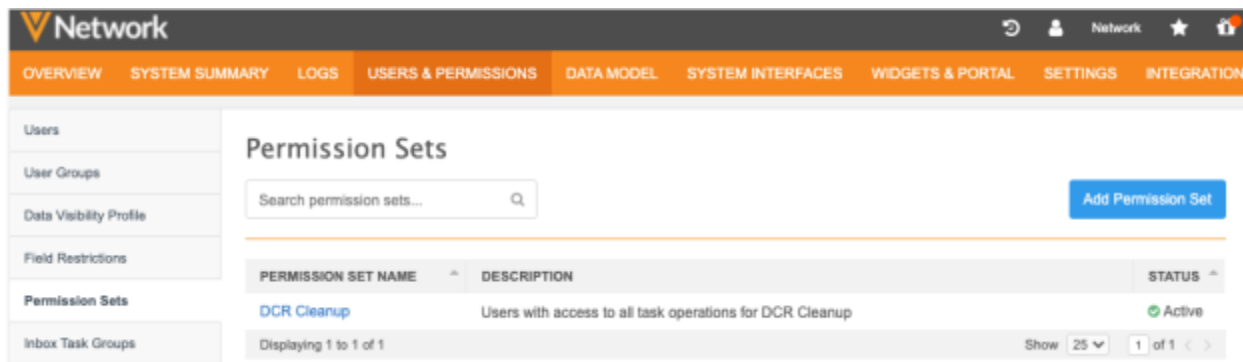
22R1

Administrators can now provide application-level access to features using permission sets. Previously, application feature access was controlled only through a user's profile or at the instance-level (General Settings). Permission sets give Administrators more granular application-level control. Permissions can be granted to user groups or individual users.

Example

The DCR Cleanup feature enables you to cancel or reject DCRs in bulk. Using permission sets, Administrators can give you access to cancel DCRs in bulk but restrict your access to reject DCRs in bulk.

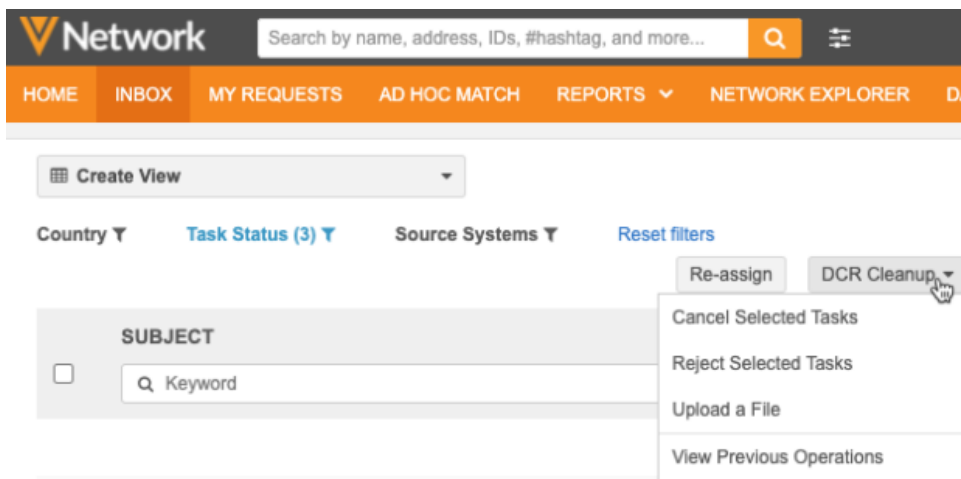
In this release, permission sets are supported for the new DCR Cleanup feature.



The Permission Sets feature is enabled by default in your Network instance.

Define a permission set

Create a permission set to give users application-level access to features; for example, the DCR Cleanup feature. Users who are not defined in this permission set will not see the **DCR Cleanup** feature in the Inbox.





For more information about the DCR Cleanup feature, see the "DCR Cleanup" topic in these *Release Notes*.

To create the permission:

1. In the Admin console, click **Users & Permissions > Permission Sets**.
2. Click **Add Permission Set**.
3. Type a **Name** and **Description**.
4. The **Status** is **Enabled** by default. When the permission set is saved, the defined users will have immediate access to the DCR Cleanup feature.

The screenshot shows a web form titled "DCR Cleanup" with a "Cancel" button and a "Save" button in the top right corner. The form is divided into two main sections: "Details" and "Permissions".

Details Section:

- Name:** A text input field containing "DCR Cleanup".
- Description:** A text area containing "Users with access to all task operations for DCR Cleanup".
- Status:** Two radio buttons are present: "Enabled" (which is selected) and "Disabled".

Permissions Section:

The section is titled "DCR CLEANUP" and contains two checked checkboxes:

- Reject tasks ⓘ
- Cancel tasks ⓘ

5. In the **Permissions** section, choose the operations the users can access.

For example, **DCR Cleanup**:

- **Reject tasks** - Bulk reject tasks.
- **Cancel tasks** - Bulk cancel tasks.

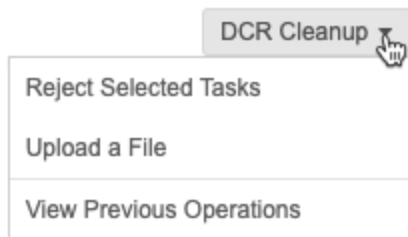
Users that have access to these operations can select the tasks from the Inbox or **Upload a File** containing task IDs. These permissions also give users access to the DCR Cleanup page (**View Previous Operations** option) to monitor their task cleanup operations.

If a user does not have access to one of the actions, it does not display in the feature.



Example

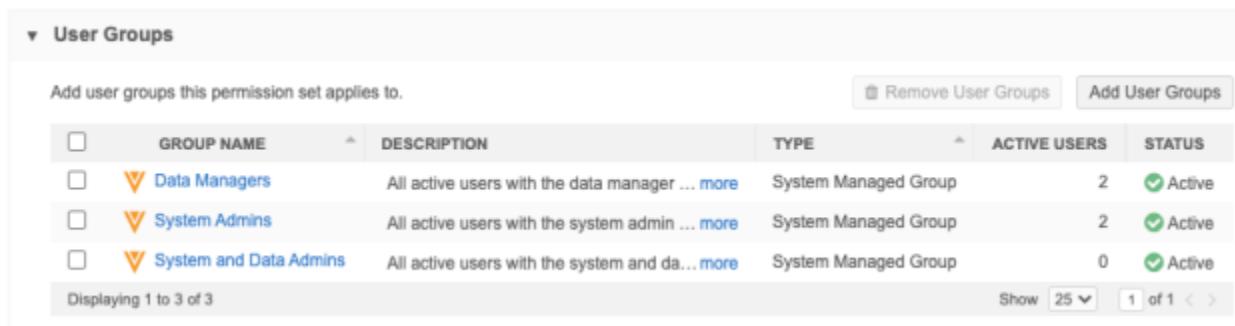
If you give users access to **Reject tasks**, but not **Cancel tasks**, the **Cancel Selected Tasks** option does not display in the **DCR Cleanup** list.



6. In the **User Groups** section, click **Add User Groups**.

Select the groups that should have access to the feature and permissions that you have defined.

Click **Add User Group**.



7. In the **Users** section, add individual users to the permission set. Click **Add Users** and select the specific users.
8. **Save** your changes.

Users assigned to this permission set will now have access to the DCR Cleanup feature.

Users page

A new section, **Permission Sets**, is added to user profile pages (**Users & Permissions > Users**) so Administrators can identify all the permission sets granted to a specific user.



data.manager@verteo.com Cancel Save

- ▶ Primary Information
- ▶ Contact Information
- ▶ Data Visibility Profile
- ▶ User Groups
- ▶ Restricted Field Access
- ▼ **Permission Sets**

PERMISSION SET NAME	DESCRIPTION	STATUS
DCR Clean Up	Users with access to all task operations for DCR Cleanup	Active

Displaying 1 to 1 of 1 Show 25 1 of 1 < >

Audit

Administrators can track the changes to permission sets in the System Audit Log.

Tip: To filter the logs, use the **PermissionSet** object type.

The following activities are tracked:

- Enabling and disabling a permission set.
- Changing a permission set: permissions, user groups, and users.

System Audit History

Export

Date range: To Object Types: Properties: Get History Reset

[Choose time period...](#)

EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY
940299027990645919	2022-03-07 22:02:52 GMT	admin@verteo.com	940263153540402335	Edit	PermissionSet	Permission Item
940299025047030943	2022-03-07 22:02:07 GMT	admin@verteo.com	940263153540402335	Edit	PermissionSet	Permission Item



Audit

SYSTEM AUDIT LOG

22R1

The System Audit Log now tracks all exports from your Network instance.

EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY
940229818475416735	2022-02-23 16:41:58 GMT	sara.data.admin@verteo.vd...	CustomerMasterDataModel	Download	Data Model	
940229813069417631	2022-02-23 16:40:36 GMT	sara.data.admin@verteo.vd...	ReferenceCode	Download	ReferenceCode	AddressCBSA
940229813069417631	2022-02-23 16:40:36 GMT	sara.data.admin@verteo.vd...	ReferenceCode	Download	ReferenceCode	All Reference Lists
940229519579090079	2022-02-23 15:25:57 GMT	sara.data.admin@verteo.vd...	ReferenceCodeAlias	Download	Reference Code	
940229519579090079	2022-02-23 15:25:57 GMT	sara.data.admin@verteo.vd...	UserList	Download	UserExport	

The following exports are now tracked:

- **Data model** - Export the data model by clicking **Export Data Model** on the data domain page (**Data Model > Data Domains**).
- **Reference data** - Export all reference lists or a specific reference list (**Data Model > Reference Data**).
- **Reference aliases** - Export a reference alias list (**System Interfaces > Reference Aliases**).
- **User list** - Export the list of users for the Network instance (**Users & Permissions > Users**).

This enhancement is enabled by default in your Network instance.

Audit log updates

The exports can be tracked using the following columns:

Export type	Item	Event Description	Object Type	Property
Data model	DataModel	Download		
Reference data - All reference types	ReferenceCode	Download	ReferenceCode	All Reference Lists
Reference codes - One reference type	ReferenceCode	Download	ReferenceCode	<Reference List Name>
Reference aliases	ReferenceCodeAlias	Download	ReferenceCode	
User list	UserList	Download	UserExport	



API

VERSION UPDATE

22R1

The Network API is updated to v26.0.

The Network API version is updated for every major release. Any additional changes are documented in this section of the *Release Notes*.

As with all version updates, Integration Users should continue to use v25.0 until there is a change for v26.0 that they want to apply.

For more information about the Network API, see the *Veeva Network API Reference* at <http://developer.veevanetwork.com>.

SUPPORTED LANGUAGES

22R1

You can now use the Metadata API to retrieve the list of reference data languages supported by Network.

Sample request

```
GET https://myveevanetwork.com/api/v26.0/metadata/languages
```

Parameters

This API takes no parameters.

Sample response

- **responseStatus** - The status of the response from Network.
- **languages** - A list of the supported reference data languages that are organized by lowest ordinal value.

When new languages are added to Network, they are appended as a new column in the `reference.csv` file for target subscriptions. **AlternateName** is used as the column headers and **alternateOrdinal** determines the order of the language columns.

```
{
  "responseStatus": "SUCCESS",
  "languages": [
    {
      "name": "en",
      "alternateName": "EN",
      "alternateOrdinal": 1,
      "associatedLocale": "en_US"
    },
    {
      "name": "zh",
```



```
        "alternateName": "ZH",
        "alternateOrdinal": 2,
        "associatedLocale": "zh_CN"
    },
    {
        "name": "fr",
        "alternateName": "FR",
        "alternateOrdinal": 3,
        "associatedLocale": "fr_FR"
    }
    ...
]
}
```