



# veeva Network

Veeva Network 20R1.0.1 Release Notes

April 2020



Contents

**About these Release Notes .....7**

    Subscribe to release notifications .....7

**Browser requirements .....7**

**Release Note updates .....7**

**What's new .....8**

**Introduction ..... 11**

    Network Customer Master .....11

**General updates ..... 12**

    Terminology .....12

**Widgets ..... 12**

    Affiliation widget.....12

        Editing.....13

        Availability .....13

    Single sign-on .....14

    Search widget.....14

        Search by ID.....14

        Supported IDs.....15

        Adding the ID search field to your widget.....17

**Reports ..... 18**

    Download reports .....18

    Query updates for data quality reports .....19

        Query updates .....19

        Affected data quality reports .....20

    SQL query editor .....24



- Profile layout configuration ..... 24**
  - Address verification .....24
    - Disable the verification status .....25
- Data updater ..... 25**
  - Merging records.....25
    - Data updater benefits .....25
    - Supported merge behavior .....26
    - Merge permissions .....26
    - Create a file .....26
    - Upload the file .....27
    - Review the file summary .....29
    - Merge records .....30
    - Job details.....31
    - Reporting .....32
  - Custom object support .....32
    - Update custom objects .....32
    - More information .....33
- Match ..... 34**
  - Match against Veeva OpenData.....34
    - Enable Match against OpenData options .....34
- Data export..... 34**
  - Custom key source .....34
    - Example .....34
    - Filtering the export.....35
- Veeva OpenData subscriptions ..... 36**



Email subscriptions for China .....	36
Enable the subscription .....	36
HIN IDs for HCOs .....	36
HIN subscription .....	36
Enable the HIN subscription .....	36
<b>Data model .....</b>	<b>37</b>
Cluster management.....	37
Reference data .....	37
Primary country .....	37
Impact to features .....	38
<b>Data domains.....</b>	<b>38</b>
Data model comparison .....	39
About data domains.....	39
Default data domain.....	39
Custom data domains.....	40
Viewing data domains.....	40
Viewing object configurations .....	41
Editing object configurations .....	43
Veeva objects .....	43
Custom objects.....	43
Creating data domains .....	43
Updating data domains.....	44
Adding objects to domains .....	45
Export the data model.....	46
Export data domains to Production instances .....	46



- Custom objects .....47**
  - Creating and editing custom objects .....47
    - Create a custom object .....48
    - Edit custom objects .....49
    - Create a custom sub-object.....50
    - Edit custom sub-objects .....51
    - Create a custom relationship object .....52
    - Edit custom relationship objects .....53
    - Configuration Management .....54
  - Profile layout editor .....54
    - Example .....54
    - Using the relationship labels .....55
    - Add the relationships to the profile layout .....56
    - Profile page .....58
- Network integrations ..... 58**
  - State License mappings.....58
  - Upsert to CRM.....59
    - Overview of tasks .....59
    - Add Salesforce credentials .....59
    - Create a connector to Veeva CRM .....60
  - Upsert to Vault.....64
    - Overview of tasks .....64
    - Add Vault credentials .....65
    - Create a connector to Veeva Vault.....65
    - Configuration management .....68



Network Bridge .....68

    Enabling and disabling subscriptions.....68

    Network Bridge page.....70

**Admin settings.....71**

    Workflow settings .....71

        Updated workflow settings .....71

        Defining criteria for workflow settings.....72

**API.....72**

    Version Update .....72



## About these Release Notes

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These Release Notes describe all features that are included in Veeva Network 20R1.0.1.

### SUBSCRIBE TO RELEASE NOTIFICATIONS

You can receive email notifications about upcoming software releases and the supporting documentation:

- **Software releases and maintenance** - Go to [trust.veeva.com](https://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 to this page, click the **Follow** button.

For more information, see [About Network Customer Master Releases](#) in the *Veeva Network Online Help*.

## Browser requirements

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These are the minimum browser requirements for Veeva Network:

- Internet Explorer™ 11+
- Google Chrome™ (most stable version at Network release)
- Safari® 10+
- Microsoft Edge™

Veeva Network is not supported on mobile devices.

## Release Note updates

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The following enhancement has been added since the Sandbox version was published

- **Geocodes** - Geocodes are now available for addresses in Austria.

The following enhancement was removed after the Early Release Notes was published:

- **Network Bridge - Batch size** - Custom batch sizes are now available for Network Bridge subscriptions.

This enhancement will not be available in Veeva Network version 20R1.0.1

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 20R1.0.1 major release.

			ST	DS	DM	AD
<b>General updates</b>						
Terminology	The names of the objects used in a custom relationship are changed.	20R1.0	●	●	●	●
<b>Widgets</b>						
Affiliation widget - Editing	Editing support is now available in the Affiliation widget.	20R1.0	●	●	●	●
Single sign-on	Network widgets now support Oracle Identity Management as an SSO provider.	20R1.0			●	●
Search widget	Users can now search for records by ID in the advanced search form.	19R3.1	●	●	●	●
<b>Reports</b>						
Download reports	Reports can now be downloaded in Microsoft Excel (.xlsx) format.	20R1.0	●	●	●	●
Data quality reports	The Network Reports feature is redesigned to help users find and run reports.	20R1.0	●	●	●	●
SQL Query Editor	Additional support is added for the LISTAGG() function.	19R3.1		●	●	●
<b>Profile layouts</b>						
Address verification	The address verification status on summary cards can be disabled on custom profile layouts.	20R1.0			●	●
<b>Data updater</b>						
Merge records	Administrators and data managers can use the Data Updater to bulk merge records using .csv or .xlsx files.	20R1.0			●	●
Custom objects	The Data Updater now supports custom objects.	19R3.1			●	●
<b>Match</b>						
Match against OpenData	Administrators can enable a setting so the match process continues to look for a superior match in the Veeva OpenData master instance.	19R3.1			●	●





			ST	DS	DM	AD
<b>Data export</b>						
Export by custom key source	Administrators and data managers can now filter target subscriptions using the custom key source.	19R3.1			●	●
<b>Veeva OpenData subscriptions</b>						
Email subscriptions	A separate email subscription has been added to CN OpenData subscriptions.	20R1.0			●	●
HIN data	Health Industry Number (HIN) data is now available only to customers with HIN licenses.	19R3.1			●	●
<b>Data model</b>						
Geocodes	Geocodes are now available for addresses in Austria.	20R1.0			●	●
Cluster management	This feature now supports IQVIA™ cluster data for Austria.	20R1.0			●	●
Reference data	Hebrew (HE) has been added as a new reference data language to support Israel (IL)	19R3.1			●	●
Primary country	The primary_country__v field is now read-only.	19R3.1			●	●
<b>Data domains</b>						
Data domains	The Network Data Model is redesigned to support data domains.	20R1.0			●	●
<b>Custom objects</b>						
Creating custom objects	Administrators can now create custom objects, sub-objects, and relationships objects. Custom objects are created in Network Sandbox instances and exported to Production instances.	20R1.0			●	●
Profile layouts	For complex relationships, profile layouts now support adding more than one section for the same relationship object so the different relationship types can display on the profile page.	19R3.1			●	●



			ST	DS	DM	AD
<b>Integrations</b>						
State License mappings	The RXA eligibility information is now available on accounts that you download using Network Account Search or import using the New DCR Account process.	20R1.0			●	●
Veeva CRM Integration	Network can now upsert object data to CRM.	20R1.0				
Veeva Vault Integration	Network can now upsert object data to Vault.	20R1.0			●	●
Network Bridge - Disabling	Network Bridge subscriptions can now be disabled.	19R3.1			●	●
Network Bridge - Page updates	The Network Bridge page is updated to include the country and status for each subscription.	19R3.1			●	●
<b>Admin settings</b>						
Workflow settings	Administrators now have more flexible workflow setting options for Veeva standard objects.	20R1.0				●
<b>API</b>						
Version update	The Network API is updated to v20.0.	20R1.0				Developers

**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.



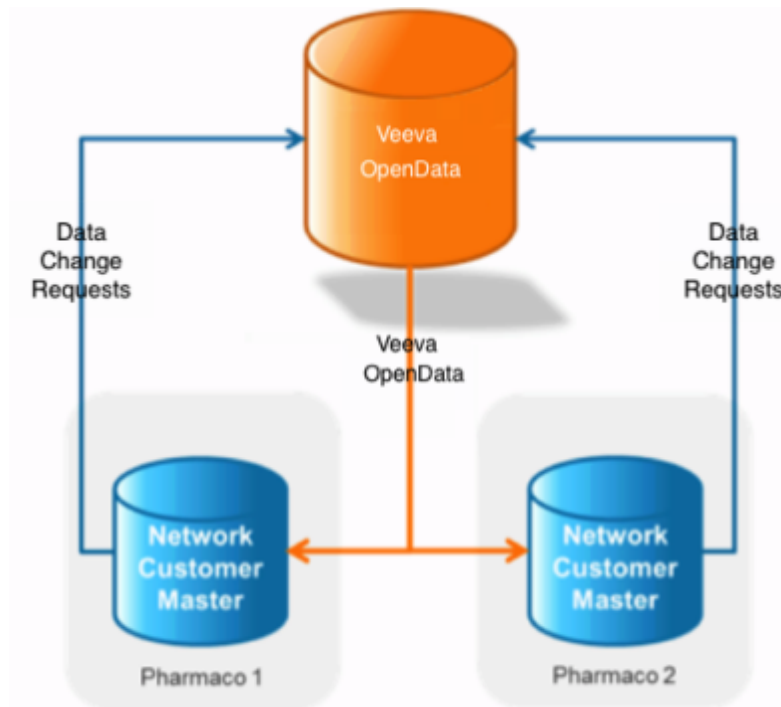
## Introduction

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Veeva Network includes Network Customer Master, and for applicable countries, Veeva OpenData Customer Data.

*Veeva OpenData* provides identity, demographic, and licensure data about Health Care Professionals and Health Care Organizations.

*Network Customer Master* is a SaaS Master Data Management (MDM) application that is populated with a subset of the data from Veeva OpenData, according to each pharmaco's contract with Veeva.



## NETWORK CUSTOMER MASTER

Veeva Network Customer Master is a multi-tenant SaaS Master Data Management (MDM) application. Each pharmaco that subscribes to Veeva Network has its own Network Customer Master tenant (often referred to as a Network instance similar in concept to a Veeva CRM or Salesforce.com org).

Where Veeva OpenData is enabled, each Network instance comes pre-populated with data from the Veeva OpenData databases to which the pharmaco has subscribed. Veeva Network automatically keeps the data in each production Network instance up-to-date and in sync with the data in Veeva OpenData.

Pharmacos can also load their own data into their Network instance and match and merge it with the Veeva OpenData data. Veeva is responsible for stewarding the quality of the Veeva-provided data as well as any new records added in the Network instance that can be shared with Veeva OpenData.

Records that do not match Veeva records will be loaded as locally managed records and updates on those records will not be shared with Veeva OpenData.



## General updates

### TERMINOLOGY

To more accurately reflect the role of the main objects within the custom relationship object, the following terms are being changed in the Network user interface and documentation:

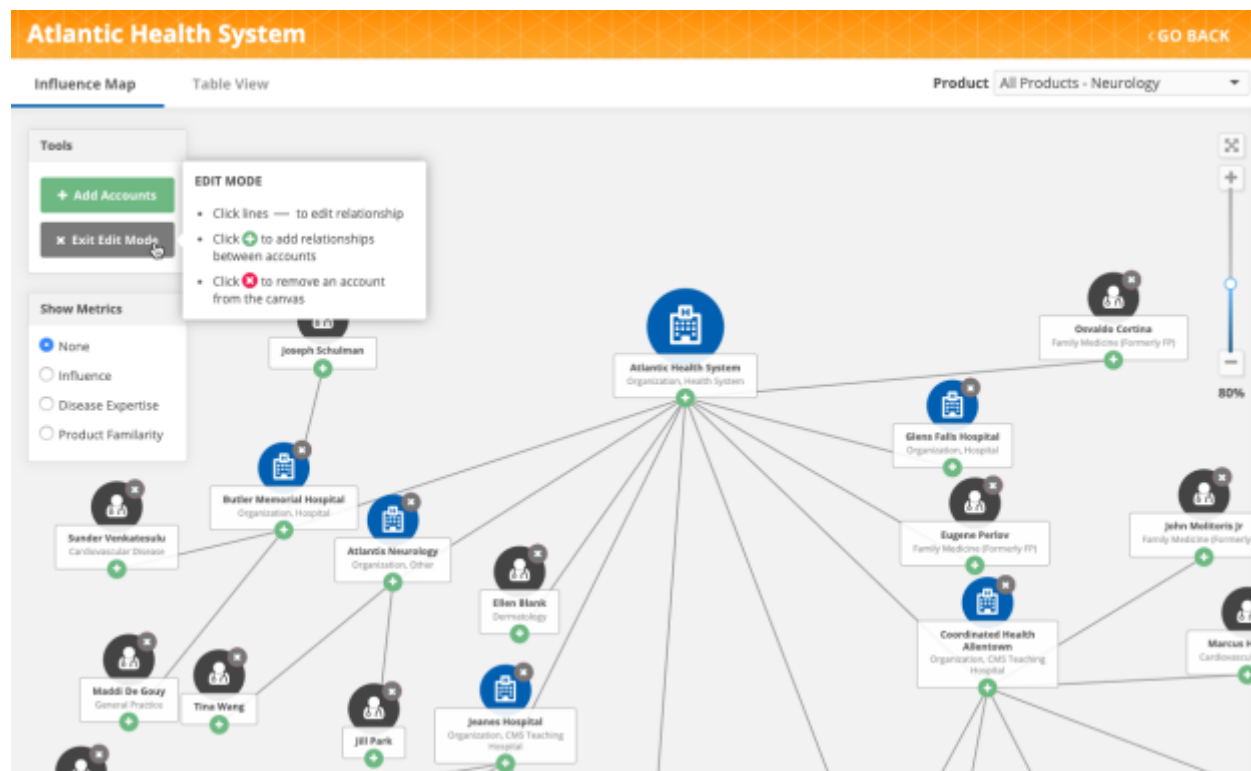
- *controlling object* is now *owner*
- *non-controlling object* is now *related object*

For more information about creating custom relationship objects, see the "Create a custom relationship object" topic in these Release Notes.

### Widgets

#### AFFILIATION WIDGET

The affiliation widget was introduced in version 19R2.1 to help users quickly understand influencers between HCPs and identify key players in a health care system. Edit mode is now available in the widget so you can develop the Influence Map by adding and removing accounts and relationships.





## Editing

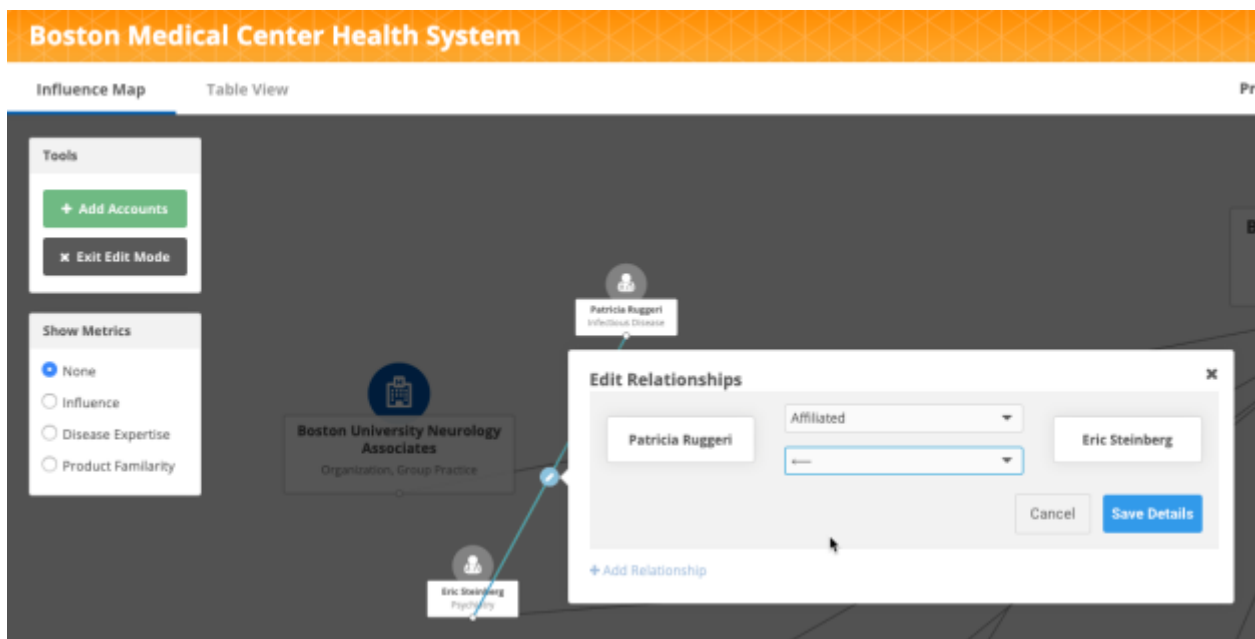
The following changes can be made on the canvas:

- Draw or hide relationships
  - HCP to HCP
  - HCP to HCO
  - HCO to HCO
- Add HCPs from Network and Veeva OpenData to the Influence Map
- Remove HCPs and HCOs from the Influence Map

## Example

You can add an account and draw a new relationship to connect the account to an existing HCP. When you create the relationship, you can define the following details:

- Direction - Specify which HCP influences the other in the relationship.
- Affiliation type - Specify how the HCPs are related.



## Availability

The affiliation widget is available for early adopters; it is not available by default. To discuss becoming an early adopter, contact your Veeva representative.



## SINGLE SIGN-ON

Network widgets now support Oracle Identity Management (IDM)<sup>™</sup> as an SSO provider.

For information about using SSO with widgets, see [Enable single sign-on](#) for widgets in the *Veeva Network Online Help*.

## SEARCH WIDGET

Business users can now search for records using an ID field in the Advanced Search form. Searching by ID can help you immediately find a specific record. Administrators must configure the search widget to use the ID field.

### Search by ID

The IDs that are available for search depend on the object and the country defined in your search form. For example, for HCOs in the United States, various license IDs and government IDs can be searched. The IDs that are available for search in some countries might only include the Network entity ID (VID) and a license. If a country is not defined, the widget searches all available IDs.

Click the **IDs Available to Search** link to see the IDs supported for your defined country and object.

**Search and Add Accounts**

[Back to Search](#) | Advanced Search

Practitioners **Organizations**

**NAME**

Corporate Name

ID

[IDs Available to Search](#)

Search by any of the following ID fields:

- AMS ID
- GLN ID
- HIN #
- License
- Network Entity ID
- NPI
- Tax ID

**LOCATION**

Address Line 1

State/Province

Country

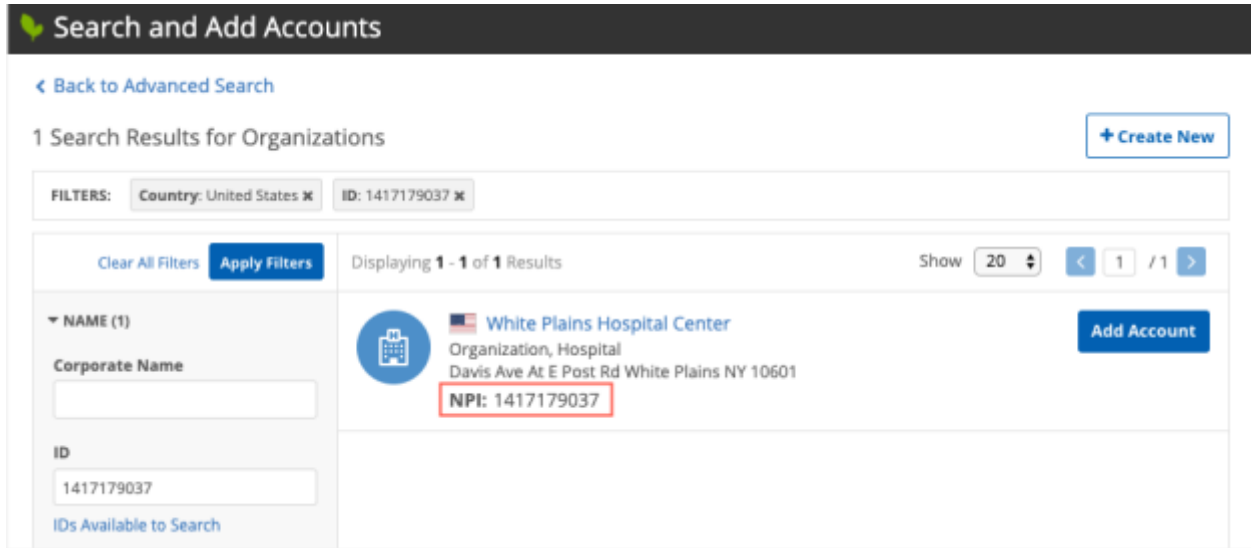
Zip/Postal Code

Clear All Filters



When users search for an ID, the widget searches their Network instance and the Veeva OpenData instance.

In the search results, the matching ID displays below each result.



### Supported IDs

The following IDs are supported for each object type. To be used in the search widget, they must be enabled in your Network instance.

#### HCOs

Field Label	Field Name
340B ID #1	340b_id_1__v
AMS ID	ams_id__v
BSNR ID	bsnr__v
CIP ID	cip_id__v
CMS Certification #	ccn_id__v
Codice Ministeriale	codice_ministeriale__v
Old Codice Ministeriale	codice_ministeriale_old__v
FINESS #	finess__v
FINESS EJ #	finess_juridique__v
GPHC ID	gphc_id__v
HIN #	hin__v
ICO ID	ico_id__v
License	license_number__v
Network Entity ID	vid__v



Field Label	Field Name
NPI	npi_num__v
Organisation Data Service Code	ods_id__v
PSI ID	psi_id__v
PSNI ID	psni_id__v
SIRET #	siret__v
Tax ID	hco_tax_id__v

### HCPs

Field Label	Field Name
ADELI ID	adelv__v
AMS ID	ams_id__v
Autorisations ID	autorisations_id__v
BIG Number	big_num__v
BIG Number 2	big_num_2__v
CMS Physician Profile ID	cms_physician_profile_id__v
GCD ID	gdc_id__v
GLN ID	gln_id__v
GMC ID	gmc_id__v
HPCP ID	hcpc_id__v
HPR ID	hpr_id__v
INAMI ID	inami_id__v
LANR ID	lanr__v
License	license_number__v
Link ID	link_vid__v
Medical Council ID	medical_council_id__v
Network Entity ID	vid__v
NPI	npi_num__v
Official College of Biologists ID	cgcob_id__v
Official College of Dentists ID	cgcod_id__v
Official College of Nurses ID	cgcoe_id__v
Official College of Pharmacists ID	cgcof_id__v
Order of Doctors ID	odm_id__v
Order of Dentists ID	odd_id__v
Order of Nurses ID	ode_id__v



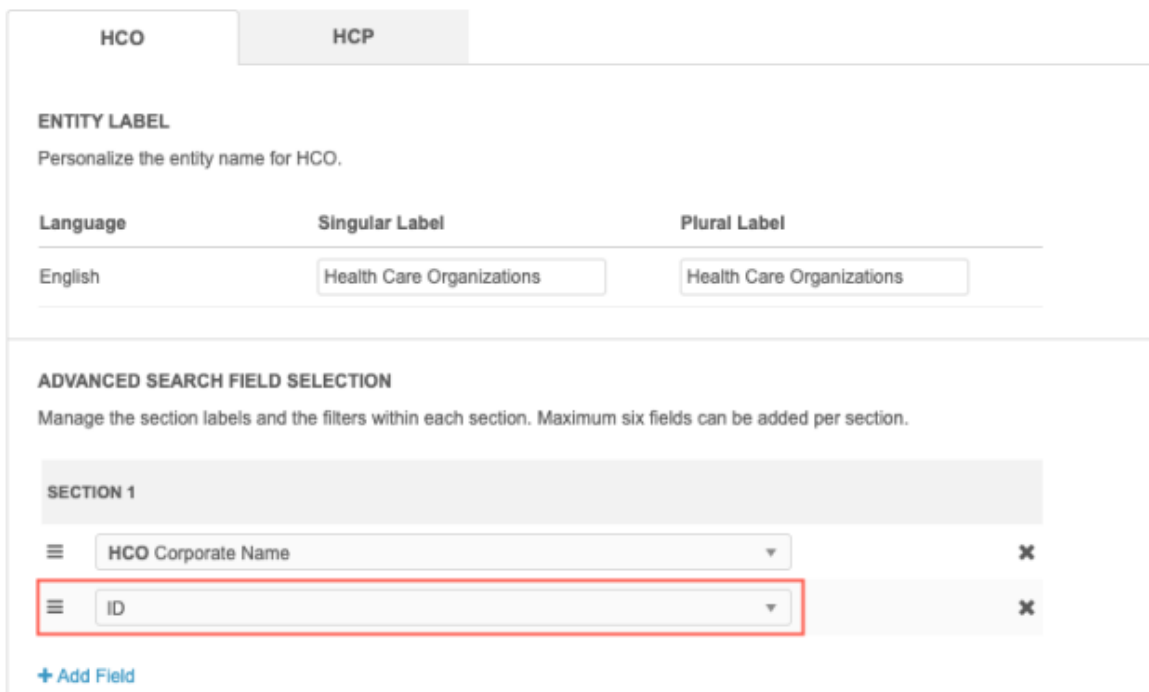


Field Label	Field Name
Order of Pharmacists ID	odf_id__v
PSI ID	psi_id__v
PWZ ID - Dentist	pwz_dentist_id
PWZ ID - Doctor	pwz_id__v
PWZ ID - Nurse	pwz_nurse_id__v
PWZ ID - Pharmacist	pwz_pharmacist_id__v
Registration ID	registration_id__v
RPPS ID	rpps__v
Stamp ID	stamp_id__v
Tax ID	hcp_tax_id__v
Vet ID	vet_registration_id__v
Universal Identification Number	uin__v

### Adding the ID search field to your widget

Administrators must add the ID search field to the widget configuration so it displays in the widget.

1. In the admin console, click **System Interfaces > Network Widgets**.
2. Select your search widget to open the configuration.
3. In the **Entity Management** section, there is an **Advanced Search Field Selection** heading on the **HCO** and **HCP** tabs. In one of the **Sections**, click **+ Add Field** and choose the **ID** field from the list.





4. **Save** your changes.
5. Click **Generate Code**. Copy the code from **Step 1** and **Step 2** and send it to your web developer to update your internal application.

After the widget code is updated in your internal application, search widget users can use the ID field in the Advanced Search form.

## Reports

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### DOWNLOAD REPORTS

You can now download report results in Microsoft Excel™ (.xlsx) format. Previously, report results were available only in .csv format. When report data is exported to Excel, all of the fields are converted to text format so the values are not automatically formatted; for example, long integer fields like Network entity IDs (VIDs) display properly instead of displaying in exponential format.

After you run a report, in the **Report Results** section, click **Download Report**. In the dialog, **Microsoft Excel (.xlsx)** is now selected by default.

**Download Report** [X]

**File Format**

Microsoft Excel (.xlsx)

CSV (.csv)

**Export Dropdown List (Reference Value) fields as**

Labels

Codes

**Language**

English [v]

Cancel Download Report

Reports can be downloaded in .xlsx format on the following pages:

- SQL Query Editor
- Basic Report Builder
- Aggregate Report Builder



## QUERY UPDATES FOR DATA QUALITY REPORTS

Queries used by some data quality reports are updated to ensure that the correct records are being identified and that issues on locally managed records are clearly indicated.

The query updates will occur by default in any instance where these data quality reports have been enabled. If a data quality report has been edited in an instance, the query will not be updated.

### *Query updates*

The following updates have been made to queries for some data quality reports.

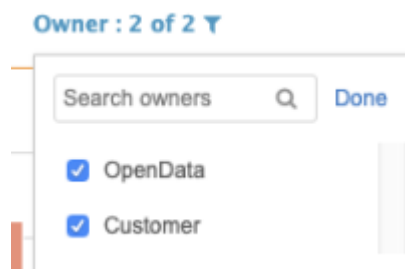
#### **Update 1- Exclude opted-out records**

Opted-out HCP records are excluded from some data quality reports. Opted-out records are currently being included which can result in records being flagged by a data quality report unnecessarily. The query is updated to check the value of the `data_privacy_opt_out__v` field for the HCP record.

#### **Update 2 - Check sub-object ownership**

Data quality report queries for sub-objects are updated to check the ownership of the sub-object records in addition to the owning entity. This refines the results to clearly indicate record ownership for data quality issues on sub-objects (addresses, license or Parent HCOs). The query is updated to set the `is_veeva_master__v` field to the Address, License, or Parent HCO object.

After the query is updated, when you select the record ownership for a report that looks for data quality issues for sub-objects (addresses, licenses or Parent HCOs), the ownership reflects the sub-object and not the owning entity (HCP, HCO).



#### **Update 3 - Exclude candidate records**

Candidate records are excluded from some data quality reports. They are currently being included which can result in records being flagged by a data quality report unnecessarily. The query is updated to check the value of the `candidate_record__v` field for records.



### *Affected data quality reports*

One or more of the updated queries will be applied to the data quality reports listed in this table. The query updates for each report are also listed.

<b>Data Quality Report Name</b>	<b>Update to be Applied</b>
Address - Active Rank 99 Address	1. Exclude opted-out records 2. Check sub-object ownership
Address - Active Address on Inactive HCP/HCO	1. Exclude opted-out records
Address - Duplicate Active Address	1. Exclude opted-out records 2. Check sub-object ownership
Address - Duplicate Address Rank	1. Exclude opted-out records 2. Check sub-object ownership
Address - HCO with Duplicate Address Type	2. Check sub-object ownership
Address - Formatted Address Incorrect (JP)	1. Exclude opted-out records 2. Check sub-object ownership
Address - Improper Postal Code (BR)	1. Exclude opted-out records 2. Check sub-object ownership
Address - Improper State/Province (BR)	1. Exclude opted-out records 2. Check sub-object ownership
Address - Improper Zip Code (US)	1. Exclude opted-out records 2. Check sub-object ownership
Address - Inactive Address Flagged as Primary Address	1. Exclude opted-out records 2. Check sub-object ownership
Address - Incomplete Active Address Line 2	1. Exclude opted-out records 2. Check sub-object ownership
Address - Missing Address Status	1. Exclude opted-out records 2. Check sub-object ownership
Address - Missing Country Code	1. Exclude opted-out records 2. Check sub-object ownership
Address - Missing Postal Code	1. Exclude opted-out records 2. Check sub-object ownership
Address - Missing Sub Admin Area	1. Exclude opted-out records 2. Check sub-object ownership
Address - Primary Country to Address Country Mismatch	2. Check sub-object ownership
Degree - Duplicate Medical Degrees	1. Exclude opted-out records 2. Check sub-object ownership
Degree - Medical Degrees - Incorrect Order	1. Exclude opted-out records
Email - Duplicate Email Address	1. Exclude opted-out records
Email - Duplicate Email Address (EU)	1. Exclude opted-out records
Email - Incorrect Order	1. Exclude opted-out records



<b>Data Quality Report Name</b>	<b>Update to be Applied</b>
Email - Incorrect Order (US, CA)	1. Exclude opted-out records
Email - Missing Email Address	1. Exclude opted-out records
Fax - Address Fax Numbers - Incorrect Order	1. Exclude opted-out records 2. Check sub-object ownership
Fax - Duplicate Address Faxes	1. Exclude opted-out records 2. Check sub-object ownership
Fax - Missing Address Fax Number	1. Exclude opted-out records 2. Check sub-object ownership
HCO - Missing URL	1. Exclude opted-out records
HCP - Credentials - Incorrect Order	1. Exclude opted-out records
HCP - Duplicate Credentials	1. Exclude opted-out records
HCP - Missing Academic Title (CN)	1. Exclude opted-out records
HCP - Missing Professional Title (CN)	1. Exclude opted-out records
HCP - Duplicate NPIs (US)	1. Exclude opted-out records
HCP & HCO - Duplicate URLs	1. Exclude opted-out records
HCP & HCO - Missing Status	1. Exclude opted-out records
HCP & HCO - Missing Type	1. Exclude opted-out records
HCP & HCO - URLs - Incorrect Order	1. Exclude opted-out records
License - Active License with Inactive HCP/HCO	1. Exclude opted-out records
License - DEA License with Missing Address (US)	1. Exclude opted-out records 2. Check sub-object ownership
License - DEA License with Incorrect License Eligibility (US)	1. Exclude opted-out records 2. Check sub-object ownership
License - DEA License with License Subtype populated (US)	1. Exclude opted-out records 2. Check sub-object ownership
License - Duplicate Active License	1. Exclude opted-out records 2. Check sub-object ownership
License - Duplicate Active License (US, CA)	1. Exclude opted-out records 2. Check sub-object ownership
License - HCP with Duplicate Active Licensing Body	1. Exclude opted-out records 2. Check sub-object ownership
License - Missing License - Doctor	1. Exclude opted-out records
License - Missing License Number (EU)	1. Exclude opted-out records 2. Check sub-object ownership
License - Missing License Status	1. Exclude opted-out records 2. Check sub-object ownership
License - Missing Licensing Body (EU)	1. Exclude opted-out records 2. Check sub-object ownership



Data Quality Report Name	Update to be Applied
License - Multiple HCPs with same License (EU)	1. Exclude opted-out records 2. Check sub-object ownership
License - State License Missing License Degree (US, CA)	1. Exclude opted-out records 2. Check sub-object ownership
License - State License Missing License Grace Expiry (US, CA)	1. Exclude opted-out records 2. Check sub-object ownership
License - State License Missing License Status Condition (US, CA)	1. Exclude opted-out records 2. Check sub-object ownership
License - State License Missing License Subtype (US, CA)	1. Exclude opted-out records 2. Check sub-object ownership
License - State License with Improper Authority Codes (US)	1. Exclude opted-out records 2. Check sub-object ownership
License - State License with Incorrect License Eligibility (US)	1. Exclude opted-out records 2. Check sub-object ownership
Name - Incomplete First Name	1. Exclude opted-out records
Name - Incomplete Last Name	1. Exclude opted-out records
Name - Missing First Name	1. Exclude opted-out records
Name - Missing First Name Furigana (JP)	1. Exclude opted-out records
Name - Missing Last Name	1. Exclude opted-out records
Name - Missing Last Name Furigana (JP)	1. Exclude opted-out records
Name - Missing Prefix	1. Exclude opted-out records
Phone - Address Phone Numbers - Incorrect Order	1. Exclude opted-out records 2. Check sub-object ownership
Phone - Duplicate Address Phone Numbers	1. Exclude opted-out records 2. Check sub-object ownership
Phone - Duplicate Phone Numbers	1. Exclude opted-out records
Phone - Incomplete Phone Number	1. Exclude opted-out records
Phone - Missing Phone Number	1. Exclude opted-out records
Phone - Phone Numbers - Incorrect Order	1. Exclude opted-out records
Relationship - Active Affiliations on Inactive HCPs	1. Exclude opted-out records 2. Check sub-object ownership
Relationship - Active Parent Affiliation with Non-Active Child Affiliation	1. Exclude opted-out records 2. Check sub-object ownership
Relationship - Department with Multiple Parent Affiliations (CN)	2. Check sub-object ownership
Relationship - Duplicate	1. Exclude opted-out records 2. Check sub-object ownership
Relationship - Duplicate ParentHCO Affiliation (CN)	1. Exclude opted-out records 2. Check sub-object ownership
Relationship - Duplicate Active Primary Relationship	2. Check sub-object ownership



<b>Data Quality Report Name</b>	<b>Update to be Applied</b>
Relationship - Duplicate Active Relationship Type (EU)	2. Check sub-object ownership
Relationship - Duplicate ParentHCO Affiliation (JP)	1. Exclude opted-out records 2. Check sub-object ownership
Relationship - Group Practices with no Satellites (US)	1. Exclude opted-out records
Relationship - HCO Orphaned Department (EU)	1. Exclude opted-out records 2. Check sub-object ownership
Relationship - HCP Affiliated to Hospital (EU)	1. Exclude opted-out records 2. Check sub-object ownership
Relationship - Inactive HCO with Active Child Affiliations	1. Exclude opted-out records 2. Check sub-object ownership
Relationship - Invalid HCP/HCO - Valid Child Object (CN)	1. Exclude opted-out records
Relationship - Missing Primary Relation Type (CN)	1. Exclude opted-out records
Relationship - Multiple Active Parent Affiliations	2. Check sub-object ownership
Relationship - No Active Affiliation	1. Exclude opted-out records 2. Check sub-object ownership
Relationship - Practice with HCO Parent Affiliation (EU)	2. Check sub-object ownership
Relationship - Practice with Multiple HCP Child Affiliations (EU)	1. Exclude opted-out records 2. Check sub-object ownership 3. Exclude candidate records
Specialty - Duplicate Specialties	1. Exclude opted-out records
Specialty - Incorrect Order	1. Exclude opted-out records
Specialty - Missing Specialty	1. Exclude opted-out records
Specialty - Missing Specialty - Doctor	1. Exclude opted-out records
Specialty - Missing Specialty Rank 1	1. Exclude opted-out records
Phone - Incomplete Address Phone Number (JP)	1. Exclude opted-out records 2. Check sub-object ownership
Address - Improper Postal Code (JP)	1. Exclude opted-out records 2. Check sub-object ownership
Address - Improper Postal Code (AU, NZ)	1. Exclude opted-out records 2. Check sub-object ownership
HCP & HCO - Invalid / Deleted / Merged Into Record with Active Custom Key	1. Exclude opted-out records
Address - Invalid / Deleted / Merged Into Address with Active Custom Key	1. Exclude opted-out records 2. Check sub-object ownership
License - Invalid / Deleted / Merged Into License with Active Custom Key	1. Exclude opted-out records 2. Check sub-object ownership
Relationship - Invalid / Deleted / Merged Into ParentHCO with Active Custom Key	1. Exclude opted-out records 2. Check sub-object ownership



## SQL QUERY EDITOR

The LISTAGG() aggregate function now supports the WITHIN GROUP (ORDER BY <list\_type>) clause so you can specify the sort order of the aggregated values.

```
LISTAGG( [DISTINCT] aggregate_expression [, 'delimiter' ] )  
[ WITHIN GROUP (ORDER BY order_list) ]
```

### Example query

```
SELECT LISTAGG(DISTINCT hcp_type__v, ', ') WITHIN GROUP (ORDER BY  
hcp_type__v)  
FROM hcp
```

### Example result

The results are sorted alphabetically by HCP type.

```
A, D, DT, N, NU, O, P, PH, R, S, T
```

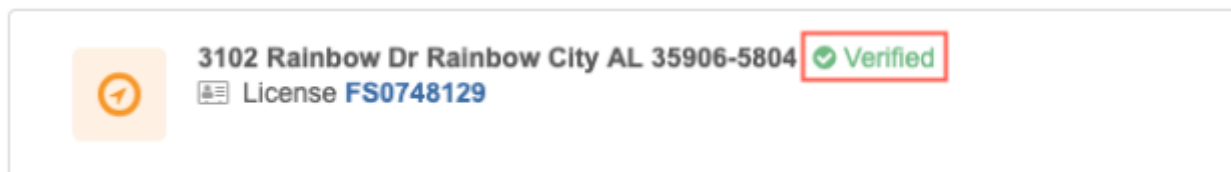
For more information about the LISTAGG function, see the [SQL functions](#) topic in the *Veeva Network Online Help*.

## Profile layout configuration

---

### ADDRESS VERIFICATION

The address verification status on summary cards can be disabled on custom profile layouts. The default behavior is for the address verification status to display if addresses have been verified by Network's third party cleansing service.



The verification status can be one of the following:

- Verified
- Partially verified
- Incomplete
- Overridden





### *Disable the verification status*

To disable the status from the summary card:

1. In the Admin console, click **Data Model > Profile Layouts**.
2. Choose a custom profile layout. Only custom profile layouts can be edited.
3. In the **Addresses** section, expand the **Address** object to view the list of fields.
4. Beside Address Verification Status, click the **Pencil** icon to edit the field.
5. On the **Edit Field in Addresses Section** dialog, clear the **Is Summary Field** checkbox.

The screenshot shows a dialog box titled "Edit Field in Addresses Section". It contains the following information:

- Type: Field
- Field: Address Verification Status
- Is Full Width?:
- Is Summary Field?:  (highlighted with a red box)
- Countries: Show 77 countries >
- Buttons: Cancel, Save

6. **Save** your changes.

Users that are assigned to this profile layout through their data visibility profile will no longer see the address verification status on address summary cards.

## Data updater

### **MERGING RECORDS**

Administrators and data managers can now use the Data Updater feature to bulk merge records using .csv files and Microsoft Excel (.xlsx) files. The file only requires you to include the Network entity ID (VID) of the losing and winning record of the merge. The data is validated and a summary of the merges is provided before the merge job runs. Data updater jobs are ad hoc jobs; they cannot be scheduled.

This feature is available by default in your Network instance.

### *Data updater benefits*

- Users can merge records without using the bulk merge option in Network's robust source subscriptions feature.
- Microsoft Excel® and .csv file are supported. Microsoft Excel files must be .xlsx files only.
- Files that you upload can be stored locally. Users do not need access to your FTP server.
- Data is scanned to ensure it is valid before records are merged.



## *Supported merge behavior*

### **Record ownership**

A locally managed record can be merged into any other record.

- locally managed record -> locally managed record
- locally managed record -> Veeva OpenData record
- locally managed record -> third party mastered record.

Veeva OpenData records and third party mastered records cannot be merged into another record.

### **Record type**

- Records must have a Valid record state.
- Records of any status can be merged.
- Candidate records can be merged in some situations.
  - candidate -> candidate
  - candidate -> non-candidate (the record will become a candidate record)Non-candidate records cannot be merged with a candidate record.

**Note:** Custom merge rules take precedence over the merge operations in this feature.

## *Merge permissions*

Administrators and data managers can access the data updater feature, but permission to use the merge operation is required for each user. If the permission is not enabled on your user account, the merge operation isn't available in the Data Updater.

Administrators can assign merge permissions to users.

1. In the Admin console, click **Users > Users**.
2. Open a user account.
3. In the **Additional Permissions** section, expand the list beside **Data Updater - Merge Records** and choose **Allow**.

For new and existing users, the value is set to **Do Not Allow** by default.

4. **Save** your changes.

That user can now use the Data Updater feature to merge records.

## *Create a file*

To merge records in your Network instance, create a .csv or Microsoft Excel (.xlsx) file that includes the Network entity ID of the winning and losing records that you want to merge. Each file should contain updates for individual objects; for example, create one file for HCPs and one file for HCOs.



## File requirements

The following requirements must be met so the file upload does not fail:

- **File data** - The file must include two columns:
  - **vid\_loser** - The Network entity ID of the losing object of the merge. This record must be a locally managed record.
  - **vid\_winner** - The Network entity ID of the winning object of the merge.

Any other columns in the file are ignored.

- **Format** - The file format must be either .csv or .xlsx.

If you are uploading a Microsoft Excel (.xlsx) file, ensure that the cells in the VID field column are defined as a text; otherwise, the VIDs might be trimmed in the file.

- **Size** - A maximum of 50,000 merges can be included in the file.

### Example file

The columns identify the losing and winning record for the merge.

vid_loser	vid_winner
929831271423063604	469731472746412800
487231198472153431	251999946348077380
826345821580184085	182904902335021120

### Upload the file

Add a file to merge the records in your Network instance.

1. On the Network menu bar, click **Data Updater**.  
This tab displays for administrators and data managers only.
2. Click **New Data Operation**.
3. On the **Select a New Data Operation** dialog, choose **Merge Records**.

If the **Merge Records** option is dimmed, you do not have permission to the operation through your user account.



## Merge Records Cancel

Merge records in bulk by uploading a file of Network Entity IDs.

1 Upload File
2 File Summary
3 Merge Records

Select Object ▼ Health Care Professional

Merge Option ● Survivorship: Use source rankings to determine which value should win during the merge.  
 Winner Priority: Take the value from the winner unless the winner does not have a value.

File Upload Required Column Headers: vid\_loser, vid\_winner. Other columns will be ignored

[See Example](#)

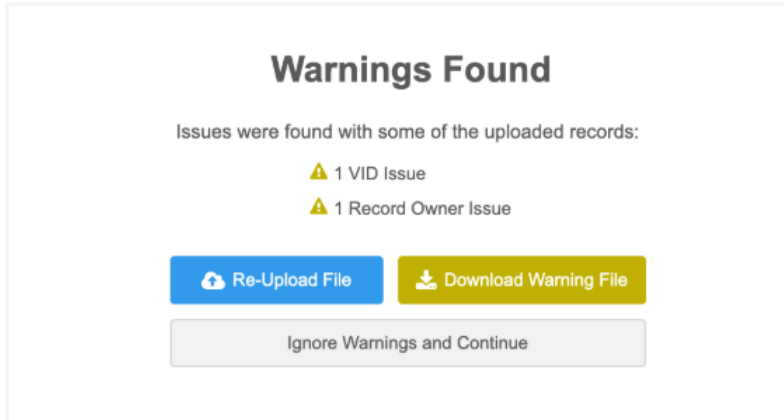
Drag CSV or Excel file here

or

Upload File

4. The **Upload File** tab specifies the object and merge operation. The following details are required:
- **Select Object** - Choose the object type that you are updating. The list displays main objects (HCPs, HCOs, and any custom objects that are enabled in your Network instance).
  - **Merge Option** - Select the merge behavior to apply to this file.
    - **Survivorship** - Use source rankings to determine the field value that is retained on the winning record.  
 This option uses the `job.merge.mergeInstruction` :  
 "InclusiveMerge" property and value.
    - **Winner Priority** - The field value on the winning record is retained. If the winning record does not have a value, keep the value from the losing record.  
 This option uses the `job.merge.mergeInstruction` :  
 "ExclusiveMerge" property and value.
  - **File Upload** - Drag your file into the box or click **Upload File** to choose a file.

When the file is added, it is scanned to validate the data.

**Possible issues:**

- **Missing VID** - A Network entity ID (VID) is missing from a column in your file.
- **VID Issues** - A Network entity ID (VID) is not valid. Ensure that each VID is 18-digits and that the VIDs are correct for the records in the file.
- **Record State Issue** - The record state is not supported for update. Only VALID record states are supported for these jobs.
- **Record Owner Issue** - The losing record is not locally managed. Only locally managed records can be merged into winning records.
- **Primary Country Issue** - The primary country of the losing and winning records do not match. Both records must have the same primary country.

A count for each issue is provided.

Fix the issues and upload the file again. If the file contains warnings only, you can download the file and fix the warnings, or ignore the warnings and upload the file.

The upload will fail for specific errors (for example, the file format is not valid) or if at least half of the records have issues; otherwise, the file will be uploaded.

***Review the file summary***

When the file is uploaded, you can view a summary of the data before you commit the changes to Network.

1. Review the details on the File Summary page.

A count for the following details display at the top of the summary:

- **Rows read** - The total number of rows included in the file for the object.
- **Valid Merges** - The number of merges that can be completed in the file.
- **Rows Dropped due to Warnings** - A count of warnings.

Download the error or warning file to identify the records with issues. The file downloads as a Microsoft Excel file. The file can contain a maximum of 250,000 errors. If the limit is reached, errors will stop being written to the file.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	vid_loser	vid_winner	Category	Type	Details								
2	r21421	512512	VID Issue	ERROR	Invalid loser VID r21421.								
3	340010216726725645	934085830081446271	Record Owner Issue	ERROR	Loser vid 340010216726725645 is a VOD. OpenData/Third Party records cannot be the loser of a merge.								
4													

The first 10 merges display.

### File Summary (vidstobmerged.csv)

1 Upload File
2 File Summary

5 HEALTH CARE PROFESSIONAL ROWS READ

3 VALID MERGES

2 ROWS DROPPED DUE TO WARNINGS

Download Warning File

Previewing 5 out of 5 merges.

ROW	STATUS	LOSER	WINNER
1	Valid Merge	 <span style="font-size: 12px;">Eula Dawson</span> <span style="font-size: 10px;">VID 934076393912074631</span>	 <span style="font-size: 12px;">Lizzie Pierce</span> <span style="font-size: 10px;">VID 934076393912205697</span>
2	Valid Merge	 <span style="font-size: 12px;">Billy Huff</span> <span style="font-size: 10px;">VID 934076393912402305</span>	 <span style="font-size: 12px;">Maggie Griffin</span> <span style="font-size: 10px;">VID 934076393912402315</span>
3	Record Owner Issue	 <span style="font-size: 12px;">Robert Forrest</span> <span style="font-size: 10px;">VID 340010216726725645</span>	 <span style="font-size: 12px;">Clide Wooden</span> <span style="font-size: 10px;">VID 934085830081446271</span>
4	Valid Merge	 <span style="font-size: 12px;">Hannah Butler</span> <span style="font-size: 10px;">VID 934076393912271241</span>	 <span style="font-size: 12px;">Callie Norris</span> <span style="font-size: 10px;">VID 934076393912205702</span>
5	VID Issue	 <span style="font-size: 12px;">No Record Found</span> <span style="font-size: 10px;">VID r21421</span>	 <span style="font-size: 12px;">No Record Found</span> <span style="font-size: 10px;">VID 512512</span>

2. To commit your changes, click **Merge Records**.
3. In the **Confirm Record Updates** dialog, you can add details to the **Job Notes** box. This can be helpful to provide context about the updates and will display on the Job Details page after the Data Updater job runs.
4. Click **Yes, Merge Records**.

### Merge records

When you confirm the merge, the Data Updater summary page opens and a message displays to notify you that the job is started. The **Status** column displays the progress of the job.

#### Data Updater New Data Operation

Only show jobs run by me
 All Operations
All Objects
All Source Systems
Reset filters

JOB ID	DATE OF UPLOAD	DATA OPERATION	RUN BY	OBJECT	SOURCE SYSTEM	ROWS UPDATED	ROWS SKIPPED	STATUS
202	2020-02-05 13:06:37 EST	Merge Records	dara@verteo.com	Health Care Professional	merge_request	2	1	Completed

Show 20 < 1 > of 1



On the Data Updater page, data managers can see the jobs that they have run; administrators can see all of the jobs run by any user in the Network instance. Filter the list of jobs by operation type, object type or source system (all merge operations use the `merge_request` source system).

Click the link in the **Job ID** column to open the Job Details page.

### Job details

The Job Details page provides a summary of the data updater job.

#### Job Details (ID: 273)

---

▼ Job Results

<b>5</b> HCP ROWS READ	<b>3</b> HCP MERGES APPLIED	<b>2</b> HCP ROWS SKIPPED
---------------------------	--------------------------------	------------------------------

▼ Job Overview

Job ID 273  
Status ✓ Completed  
Start Time 2020-04-03 10:32:00 EDT  
Duration 3 minutes  
Run By dharssan@verteo.vdmdev.com  
Operation ➤ Merge Records  
Object Updated Health Care Professional  
Merge Option Survivorship  
Source System merge\_request  
Job Notes

▼ File Summary

FILE DETAILS	<a href="#">vidstobemerged.csv</a> FILE UPLOADED	Health Care Professional OBJECT UPDATED	<b>5</b> ROWS READ
--------------	---	--	-----------------------

### Job Results

This section provides an overview of the records that were updated.

The following counts display:

- **Rows Read** - The number of merges that were included in the file.
- **Merges Applied** - The merges that occurred during the job.
- **Rows Skipped** - A count of merges that did not occur because of warnings or errors. You can download the error file [here](#).



## Job Overview

This section displays the job information, including any job notes that you provided.

**Note:** The **Source System**, `merge_request`, is an internal system that the Data Updater uses for these merge jobs.

## File Summary

Review the file details, selected object, and merges that were included in the file.

## Job Error Log

This section displays if the job included any errors.

### *Survivorship for future merges*

After records have been merged with the Data updater, regular survivorship is applied to future updates.

### *Reporting*

Data updater job statistics are available in Network reports.

## CUSTOM OBJECT SUPPORT

The Data Updater feature now supports custom objects. Previously, only Veeva standard objects were supported for the Data Updater.

This enhancement is available by default if custom objects are enabled in your Network instance. To update custom objects, you must have access to the object through your data visibility profile.

### *Update custom objects*

You can update custom objects by uploading a file and choosing the custom object in the Data Updater job. Custom sub-object and custom relationship objects also display in the list if you have access to the root object.





**Network** Search by name, address, IDs, and more...

HOME INBOX MY REQUESTS AD HOC MATCH REPORTS NETWORK EXPLORER DATA UPDATER

1 Upload File 2 File Summary

Select Object \* -

Source System \*

Does your file contain third party data? (Example: data licensed from IMS/IQVIA) \*

File Upload [See Example](#)

- Health Care Professional
- Health Care Organization
- Address
- License
- Parent HCO
- Study**
- Training

Custom objects can also be updated when you make changes to a related object; for example, if you upload an Address file, those changes can now update custom objects.

## Job Details (ID: 24426)

▼ Job Results

**3**  
ADDRESS RECORDS UPDATED

OTHER AFFECTED OBJECTS	UPDATED RECORDS
HCP	1
Employee	2

### More information

To learn how to update records using this feature, see the [Data updater](#) topic in the *Veeva Network Online Help*.



## Match

---

### MATCH AGAINST VEEVA OPENDATA

The Match Against Veeva OpenData process can now find all possible matches in both your Network instance and the OpenData master instance and choose the highest ranked match.

When you use the Match against OpenData option in a source subscription or ad hoc match job, the match process first looks for matches to OpenData records that exist in your Network instance. If a match is found using any of the match rules, your locally managed record is merged into that Veeva OpenData record. Now, administrators can enable a setting so the match process will continue looking for a superior match (meaning that a record matches uses a higher ranked match rule) in the Veeva OpenData master instance, even if a match has already been found in your Network instance. This ensures that you have the best possible match.

#### *Enable Match against OpenData options*

To direct the match process to continue looking for superior matches in the Veeva OpenData master instance, contact Veeva Support. Once enabled by Support, administrators can enable the **Consider records in OpenData Master** setting on the General Settings page.

## Data export

---

### CUSTOM KEY SOURCE

Administrators and data managers can now filter target subscriptions to export records using the custom key source. This filter is similar to the existing Source System filter, but instead of exporting records based on the system that was used to load the data into Network, it exports the records based on the external source of the custom key, which can be different.

This is helpful if you use a single source subscription to load multiple custom key sources. To export specific records to downstream systems, you can filter on the external custom key source, not the source system that was used to load the source subscription.

Only active and inactive custom keys are supported; custom keys that are Source Deactivated will not be exported.

This enhancement is enabled by default in your Network instance.

#### *Example*

Using a single source subscription, you load a file that includes records from two different sources: DMD and RM. You load the into Network using the `ServiceCloud` system; all source subscriptions are assigned to one system.



first_name__v	key_source__c	key_value__c
Bob	DMD	001
Maria	RM	002
Rajiv	RM	003
Sunny	DMD	004

**Note:** When files are loaded through a source subscription, the custom key for the record is tied to the system that is assigned to the subscription (in this example, `ServiceCloud`), so the model map must be updated to define the custom key from the sources in your file instead; for example, `DMD:HCP:001`.

To update your downstream system with records from the DMD source only, filter your export options using the **Custom Key Source** field (`custom_key_source_type__v`).

▼ Health Care Organization Export Options

All Records  
 Select Records

ⓘ Records exported will match at least ONE of the following condition groups.

Group 1 ✕

FIELD	CONDITION	VALUE	
Custom Key Source ▾	Equals ▾	DMD	✕

[+ Add Condition](#)

Only the records that have DMD as the custom key source (`custom_key_source_type__v`) in an active or inactive custom key are included in the export. If a record has a source deactivated custom key with DMD as the custom key source (`custom_key_source_type__v`), it will not be exported.

### Filtering the export

To filter a target subscription on custom key source:

1. In the Admin console, click **System Interfaces > Target Subscriptions**.
2. Select an existing subscription or create a new subscription.
3. In the applicable **Export Options** sections, choose **Select Records** and click **+ Add Condition**.
4. Define the following settings:
  - **Field** - Choose **Custom Key Source**.
  - **Condition** - Choose **Equals**.
  - **Value** - Type the custom key sources for the records that you want to export. The source names are not case-sensitive.
5. **Save** your changes.

When the target subscription runs, the records that meet the custom key source filter will be exported to your downstream system.



## Veeva OpenData subscriptions

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### EMAIL SUBSCRIPTIONS FOR CHINA

A separate email subscription has been added to OpenData subscriptions for China (CN). This change aligns CN OpenData with other OpenData regions and allows you the option to manage the email data in your Network instance or have Veeva OpenData manage it. There is no additional cost for email data in China.

#### *Enable the subscription*

If you already subscribe to OpenData for China, you will be automatically subscribed to the separate email subscription on your China OpenData subscription page. New customers for China OpenData can enable the email subscription if they want the China OpenData team to manage their email data.

### HIN IDs FOR HCOs

In the United States, a license is required if you want to receive Health Industry Number (HIN) IDs. For compliance, Veeva OpenData can provide HIN data only to customers that have a HIN license. Previously, HIN ID data was available to all customers.

#### *HIN subscription*

US Veeva OpenData subscriptions now contain the **Include HIN data** option that can be enabled if you have a HIN license. Enabling the HIN data subscription ensures that you continue to receive HIN IDs from Veeva OpenData when records are updated in your Network instance.

There is no extra cost for enabling this subscription and receiving this data.

#### *Enable the HIN subscription*

If you subscribe to OpenData for the United States and have a HIN license, the subscription will be enabled and you will continue to receive HIN data.

For new customers, the HIN subscription is disabled by default until a license is verified.

If you do not have a HIN license, the subscription cannot be enabled; the option will be dimmed on the US OpenData subscription. The `hin__v` field can be managed locally; data change requests on the HIN ID will be sent to local data stewards.

The HIN field is useful for matching purposes.



## Data model

---

### GEOCODES

Latitude and longitude fields are now populated and persisted for addresses in Austria.

This enhancement is enabled by default for addresses in Austria when address cleansing is enabled in your Network instance. These values will display on address records after they are loaded, or after they have been updated.

The **Latitude** and **Longitude** fields are available using the **Extended Info** link on an address in a record profile.

### CLUSTER MANAGEMENT

Customers can enrich addresses in additional countries by adding cluster codes. In this release, Network has included support for the following third party cluster provider / country combination:

- Austria - IQVIA™

A TPA must be signed with the third party cluster provider to use the cluster management feature. For more information, see the topic called [Managing clusters](#) in the *Veeva Network Online Help*.

### REFERENCE DATA

Hebrew (HE) has been added as a new reference data language to support Israel (IL). The Network UI and data model for Israel is in English.

### PRIMARY COUNTRY

The `primary_country__v` field for HCP and HCO objects is now read-only throughout Network.

The primary country is defined when a record is created. Previously, the field was editable by a source subscription, the Network API, and on the profile page. If the primary country of a record is changed, problems can occur when the record is later updated or exported to downstream systems because the reference values will be out of sync. Reference data is managed by country so changing a record's primary country can make the existing reference values incorrect. Changing the primary country can also cause users to unexpectedly lose access to records because of their data visibility profile permissions.



## Impact to features

This update impacts the following Network features:

- **Profile page** - The field will be read-only. A lock icon will display.
- **Data load** - Changes to the primary country will be skipped but other updates will be processed as usual. A job warning displays in the **Job Error Log** on the Job Details page. The message will include the record's Network entity ID (VID) or the custom key so administrators or data managers can identify the problematic record.

**Note:** This behavior applies to all types of jobs, including merge requests.

- **Network API** - Changes for the `primary_country__v` field will be denied. The response will display a failure message for the field.
- **Suspect matches** - Matches cannot be created if the records have different countries. This is existing behavior.

## Data domains

---

The Network data model is redesigned to support data domains. A *data domain* is used to logically group objects for a specific area of activity or knowledge. Data domains can be created for each business purpose; for example, you might create a domain for product data and one for clinical study data. The domain contains all of the related objects (and fields) for your data model, so Veeva standard objects and custom objects can belong to more than one domain.

All objects will be part of a data domain; objects cannot exist outside a domain. Data domains also include the ability to create custom objects in your Network instance. Previously, custom objects were created in your instance by the Veeva Network product team. For more information, see the "Creating custom objects" topic in these *Release Notes*.

Data domains are created in Sandbox instances so they can be thoroughly tested before being exported and used in Production instances.

This feature is enabled by default in your Network instance.



## Data model comparison

Previously, objects were organized into the **Network Data Model** and **Custom Objects Data Model**. Now, those two pages have been combined into the Data Domains feature. You can access your existing data model objects through the default **Customer Master** data domain and you can create new data domains for specific business purposes.

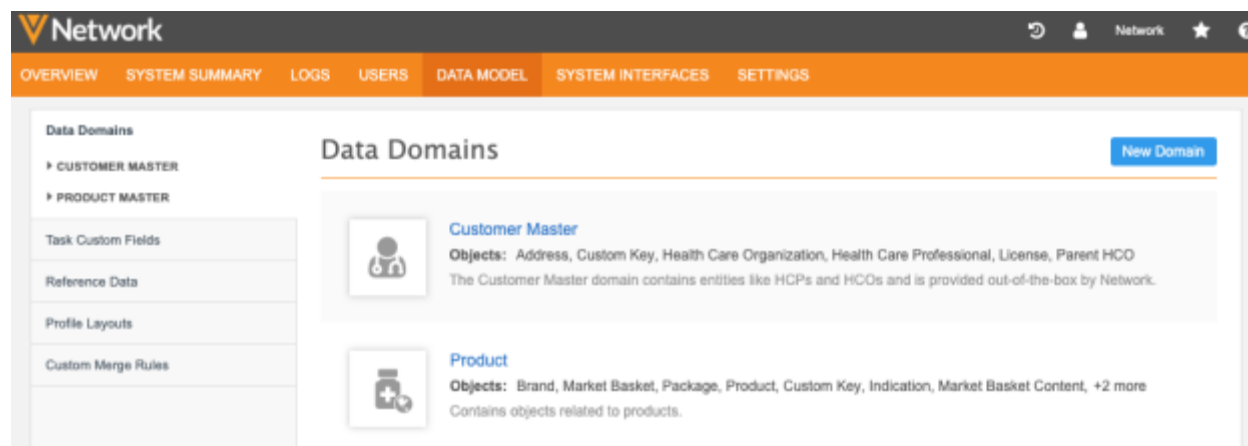
Name	Previous Object Organization		New Object Organization	
	Network Data Model	Custom Objects Data Model	Customer Master Data Domain	Custom Data Domains
<b>Objects included</b>	Veeva standard objects: HCPs, HCOs, Addresses, Licenses, Parent HCOs	All custom objects, custom sub-objects, and custom relationship objects created for your Network instance.	Veeva standard objects: HCPs, HCOs, Addresses, Licenses, Parent HCOs  Custom objects: Any custom objects related to the Veeva standard objects.	New domains are created for specific areas of your business.  Custom objects: Custom objects related to a specific activity or knowledge. For example, Products.  Veeva standard objects: Any standard object related to a custom object in the domain.
<b>Fields included</b>	All system, Veeva, and custom fields related to the objects.	All system, Veeva, and custom fields related to the objects.	All system, Veeva, and custom fields related to the objects.	All system, Veeva, and custom fields related to the objects.
<b>Created by</b>	Network	Network	Network	Customers

## ABOUT DATA DOMAINS

### Default data domain

The **Customer Master** domain is created by default for your Veeva standard objects (HCPs, HCOs, addresses, licenses, parent affiliations).

This domain is available in Sandbox and Production instances. The configuration (name, description, and icon) is read-only, but custom objects can be added to the data domain.



### *Custom data domains*

When you create custom objects for specific business areas, you can create new domains to organize those objects; for example, you can create a domain for a Product data model or a Clinical Studies data model.

Data domains are available in Sandbox and Production instances but can be created only in Sandbox instances. Use the Configuration Management feature to move newly created custom data domains into your Production instance.

### VIEWING DATA DOMAINS

To view the objects in the default data domain, click **Customer Master**.

The **Objects** section lists all of the objects that belong to this domain. Each object row defines the object name, type, number of assigned fields, and status (enabled or disabled).

Objects types are associated with domains in the following ways:

- **Main objects** (for example, HCPs and HCOs) - Directly associated to domains. If you create a new custom object, you must create it in a domain.
- **Sub-Objects** (for example, addresses, licenses) - Automatically associated to the domain through the main object.
- **Relationship object** (for example, parent HCO affiliations) - Associated if the owning object (main object) in the relationship is in the domain.





**Customer Master**  
DOMAIN  
On this page: Details - Objects - Domain Icon

**Details**

Domain Name: Customer Master  
Domain Code: customer\_master  
Description: The Customer Master domain contains entities like HCPs and HCOs and is provided out-of-the-box by Network.

**Objects**

LABEL	NAME	TYPE	FIELDS	STATUS
Health Care Organization	HCO	Object	267	Enabled
Health Care Professional	HCP	Object	280	Enabled
Address	ADDRESS	Sub-Object	110	Enabled
Custom Key	CUSTOMKEY	Sub-Object	13	Enabled
License	LICENSE	Sub-Object	40	Enabled
Parent HCO	PARENTHCO	Relationship	65	Enabled

**Domain Icon**

Icon Preview:

You can also access objects by expanding the domain in the left navigation on the **Data Model** tab.

## VIEWING OBJECT CONFIGURATIONS

Veeva standard objects now have configuration pages. Previously, only custom objects had configuration pages.

To view an object's configuration, in the **Objects** section of a domain, click an object name; for example, click **Health Care Organization**.

Each object page displays the following details:

- **Names** - **Object Name** and **API Name**.
- **Type** - The object type (**Object**, **Sub-Object**, **Relationship**)
- **Domains** - The data domains that the object belongs to.
- **Status** - **Enabled** or **Disabled**. Veeva standard objects cannot be disabled.
- **Fields** - All of the standard and custom fields that belong to the object. Fields can be enabled and disabled. Custom fields can be added.
- **Labels** - Localization for the object for other languages.



- **Objects** - Sections for sub-objects, relationship objects, or main objects (depending on the type of object that you are currently viewing). Click the related object to navigate to its page.

Relationship objects also list the owning objects and related objects in the relationship and the perspective labels for each object.

- **Duplicate Detection Rule** (sub-objects and relationships only) - Unique fields that Network uses for determining duplicates and for merging records.
- **Source Survivorship Rules** - The priority of source systems for determining survivorship.
- **Object Icon** - The icon assigned to the object that identifies it throughout the Network UI.

H

## HCO

OBJECT

On this page: [Object Details](#) · [Fields](#) · [Labels](#) · [Sub-Objects](#) · [Relationship Objects](#) · [Source Survivorship Rules](#) · [Object Icon](#)

Cancel
Save

---

▼ Object Details

Object Name

API Name

Type

Domains

Status  Enabled  Disabled

▼ Fields + Add Field

All countries  All fields  All types   Show disabled fields


NAME	LABEL	TYPE	REFERENCE TYPE	STATUS
▼ <a href="#">340B_eligible__v</a>	340B Eligible?	Checkbox	<a href="#">BooleanReference</a>	<input checked="" type="checkbox"/> Enabled
▼ <a href="#">340B_id_1__v</a>	340B ID #1	Text		<input type="checkbox"/> Disabled
▼ <a href="#">340B_id_2__v</a>	340B ID #2	Text		<input type="checkbox"/> Disabled
▼ <a href="#">accept_medicaid__v</a>	Accept Medicaid?	Checkbox	<a href="#">BooleanReference</a>	<input checked="" type="checkbox"/> Enabled
▼ <a href="#">accept_medicare__v</a>	Accept Medicare?	Checkbox	<a href="#">BooleanReference</a>	<input checked="" type="checkbox"/> Enabled



## EDITING OBJECT CONFIGURATIONS

### *Veeva objects*

Veeva objects are mostly read-only, but the following changes can be made:

- Custom fields can be created.
- Fields can be enabled or disabled if they are editable.  
Fields that have a toggle  in the **Status** column can be enabled or disabled. Fields that do not have a toggle are read-only.
- Sub-objects can be added to main objects.  
All sub-objects are available in the list because sub-objects are not directly associated to a domain.
- Main objects can be added to sub-objects and relationship objects.  
When you add main objects to sub-objects, the list of main objects is restricted to the current domain.
- Source rankings can be updated.

### *Custom objects*

Custom object configurations can now be edited in your Sandbox instance. Previously, custom objects were created by Veeva and only specific parts of the object could be edited; for example, custom fields could be added, and source rankings could be defined. Administrators now have full edit access to custom objects.

For more details, see the “Editing custom objects” topic in these *Release Notes*.

## CREATING DATA DOMAINS

Administrators can add a data domain to contain custom objects for a specific business purpose. Custom objects must be created in a domain, so when you add a data model to your Network instance, create the domain first and then create the custom objects.

Data domains can be created in Network Sandbox instances only.

**Note:** Domains cannot be deleted after they have been saved.

To add a domain:

1. In the Admin console, click **Data Model**.
2. The Data Domains page opens by default. Click **New Domain**.
3. Define a **Domain Name** and **Description**. For example, you might create a domain for product objects.
4. The **Objects** section for new domains is empty.



5. In the **Domain Icon** section, click **Choose Icon** to select the icon that will be associated with the domain.
6. Click **Create Domain** to save the domain to your Sandbox instance.

?

## New Domain

DOMAIN

On this page: [Details](#) · [Objects](#) · [Domain Icon](#)

Cancel
Create Domain

▲ The domain has not been created yet.

**▼ Details**

Domain Name \*

Description \*

**▼ Objects**

LABEL	NAME	TYPE	FIELDS	STATUS
No objects in this domain. Please create the domain first before adding objects.				

**▼ Domain Icon**

You can select the icon that will best represent your object on the object profile page.

Icon Library \* Choose icon

Icon Preview

## UPDATING DATA DOMAINS

The Customer Master domain cannot be changed; it is read-only.

Custom domain configurations can be changed in Sandbox and Production instances. You can rename the domain, update the description or change the icon.



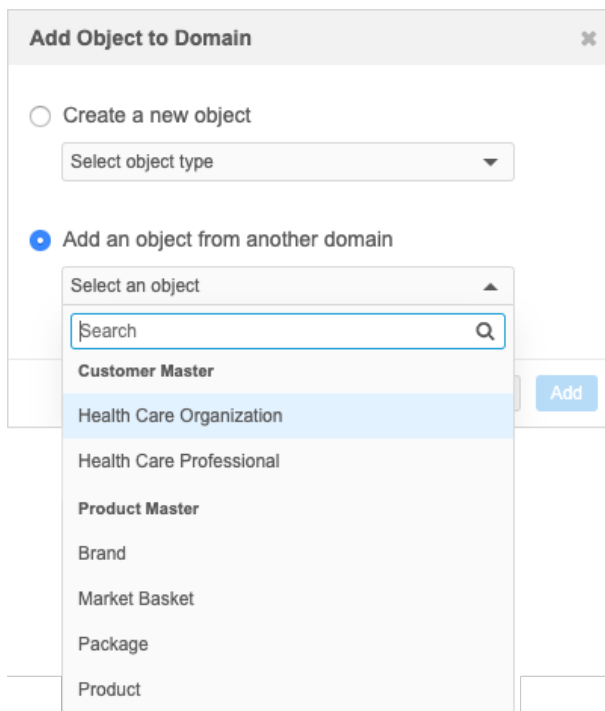
## ADDING OBJECTS TO DOMAINS

Administrators can add existing objects to domains or create a new custom object for the domain.

**Note:** Creating new custom objects is supported only in Sandbox instances.

To add objects to a data domain:

1. In the Admin console, click **Data Model**.
2. Open a data domain.
3. In the **Objects** section, click **+ Add Object**.
4. In the **Add Object to Domain** dialog, choose one of these options:
  - **Create a new object** - Create a new custom object to add to this domain.  
Custom objects can now be created by administrators in Sandbox instances. For detailed information, see the "Creating custom objects" topic in these *Release Notes*.
  - **Add an object from another domain** - Select an existing object from another domain to add it to the current domain. If there is only one domain in your Network instance, this option is not available.  
Only main objects can be added from another domain. Sub-objects and relationship objects are included in the domain by their association with the main object. A relationship object becomes associated with a domain if the owning main object belongs to the domain.



5. To save your changes, click **Update Domain**. When the domain is saved, the object is added to the domain.



## Domain association for objects

Objects must belong to a data domain. When you create an object, update an object, or add an existing object to a domain, the domain association follows these rules:

- Main objects bring their related sub-objects to the domain.
- Sub-objects do not bring their related main objects to the domain.
- Relationship are associated with the domains of the owning object.

### *Export the data model*

The data model can still be exported locally as a Microsoft Excel™ file.

To export, select a data domain and click **Export Data Model**. The data model downloads with the following naming convention "Data Domain as of <date>.xlsx". This is existing behavior that has not changed.

### *Export data domains to Production instances*

To move data domains and custom objects from your Sandbox instance to your Production environment, export the configurations using Network's Configuration Management feature.

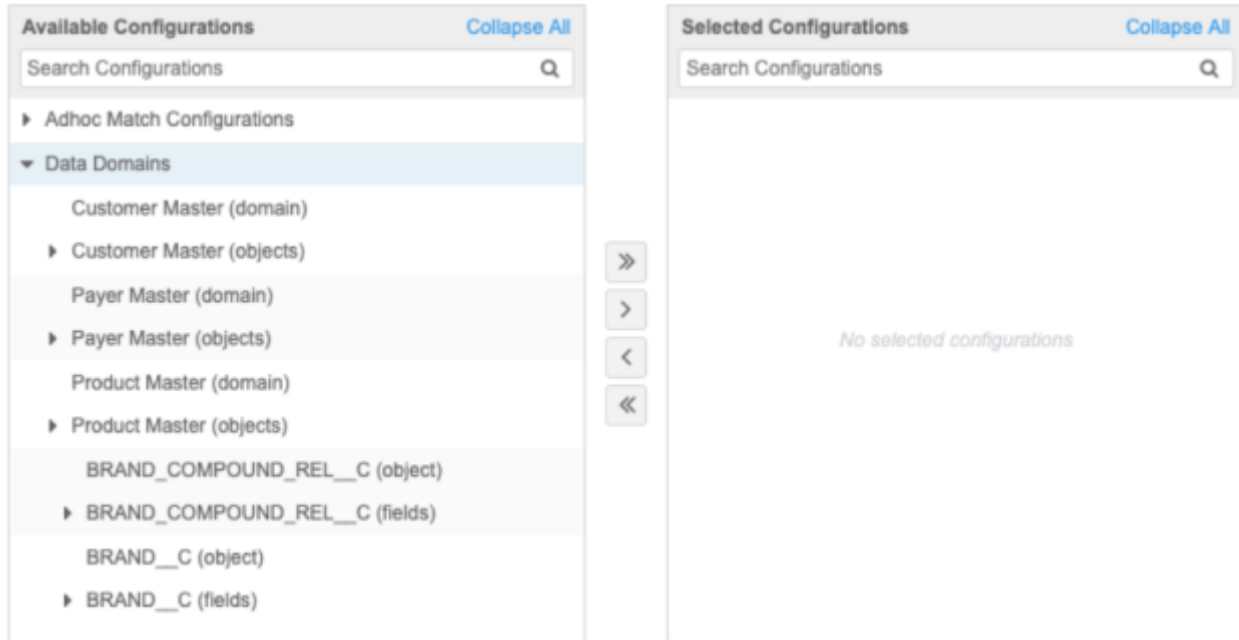
When a data domain or a custom object is created, it is assigned a unique and static code. If the domain is renamed, the code does not change. The code is used when you import the configuration to your production instance to match against existing domains or objects.

## Creating an export package

When you are creating an export package (**Settings > Configuration Export**), the data domains in your Network instance are located in the **Data Domains** node. This node replaces the **Network Data Model** and **Custom Objects** nodes that previously contained those data model objects.

The **Available Configurations** pane contains two main items for each domain:

- **Domain configuration** - The data domain itself; for example, Product Master (domain). Moving this item into the **Selected Configurations** pane moves the domain itself. A domain can exist without any data model objects.
- **Domain objects** - All of the objects in a data domain; for example, Product Master (objects). Moving this item into the **Selected Configurations** pane moves the domain and all of the dependent objects.



You can also export individual objects in your package. When you add individual objects to your export package, the following dependencies are added:

- **Main object** - The data domain is added; an object cannot exist without a data domain.
- **Sub-object** - Main objects are added.
- **Relationship object** - Main objects are added.

Other dependencies for custom objects might need to be manually added. For more information, see [Custom object dependencies](#) in the *Veeva Network Online Help*.

After you have created the package on your Sandbox instance, you can import it to your Production instance.

## Custom objects

---

### CREATING AND EDITING CUSTOM OBJECTS

Administrators can now create and edit custom objects. Previously, custom objects were created by Veeva and then you could enable the custom object in your Network instance. Now, custom objects can be created and edited in your Network Sandbox instance. After the objects are enabled and tested, you can export them to your Production instance.

This feature is enabled by default in Sandbox instances.

**Note:** Custom objects cannot be deleted after they are created.



## Create a custom object

Custom objects must belong to a data domain. For more information, see the "Data Domains" topic in these *Release Notes*.

To create a custom main object in your Sandbox instance:

1. In the Admin console, click **Data Model**.
2. Open a data domain and click **+ Add Object**.  
All objects must belong to a data domain.
3. In the **Add Object to Domain** dialog, choose **Create a new object** and select **Object** from the list.  
If this is an empty domain, only the main **Object** type is available in the list.

The New Object page displays.

**New Object (Disabled)**  
OBJECT  
On this page: [Object Details](#) · [Fields](#) · [Labels](#) · [Sub-Objects](#) · [Relationship Objects](#) · [Dynamic Access Control](#) · [Source Survivorship Rules](#) · [Object Icon](#)

**Object Details**

Object Name \*  \_C

Type

Domains

Status  Enabled  
 Disabled

*This object can be enabled after it is created.*

Description \*

In the following sections, configure the details for the object.

4. **Object Details** - Define the **Object Name** and **Description**.

**Note:** The **Object Name** cannot be edited after the object is saved.

The following details are read-only:

- **Type** - The object type that you chose in the **Add Object to Domain** dialog.
- **Domains** - The data domains that the object belongs to. New objects list the current domain. When you edit an existing object, any domains that it belongs to will display.
- **Status** - New custom objects are saved as **Disabled**. You can enable the object after it is saved.





5. **Fields** - This section lists the default fields that are created for each custom object. After this object is saved, you can add custom fields.
6. **Labels** - Type the singular **Label** and **Plural** label that will be used for the custom object in the Network UI for all of the languages required.
7. **Sub-Objects** - Add existing sub-objects if required. Sub-objects from any domain can be selected. After an object is created, a Custom Keys sub-object is automatically added to this section.
8. **Relationship Objects** - This section is empty. When this object is added to a custom relationship object, the relationship object will display here.
9. **Dynamic Access Control** - Click **Enable Dynamic Access Control Rules** if you want to restrict this custom object to specific users. When Dynamic Access Control is enabled on the object, users cannot access the object unless they are included in a rule. For more information, see the [Dynamic access control](#) topic in the *Veeva Network Online Help*.
10. **Source Survivorship Rules** - Define the priority of sources for the custom object.
11. **Object Icon** - Choose the icon that will identify this object throughout the Network user interface.
12. **Save** the new custom object.

When the object is saved, it is automatically associated with the current domain. Custom objects are saved as disabled. You can enable the custom object when you are ready to use it.

### *Edit custom objects*

After a custom object has been created, the following configuration details can be edited in your Sandbox instance or Production instance.

Changes can be made to the following details:

- Description
- Labels
- Source rankings
- Object icon

After you enable a custom object and save the changes, a reminder to create a profile layout displays. For more information about the process of provisioning custom objects in your Network instance, see [Getting started with custom objects](#) in the *Veeva Network Online Help*.



## Brand

**OBJECT**

On this page: [Object Details](#) · [Fields](#) · [Labels](#) · [Sub-Objects](#) · [Relationship Objects](#) · [Dynamic Access Control](#) · [Source Survivorship Rules](#) · [Object Icon](#)

Cancel
Save

**?** No layouts defined for this object

In order to view records for this object

1. Add a layout in the [Profile Layout Editor](#)
2. Assign that layout to a [Data Visibility Profile](#)
3. Add that Data Visibility Profile to your [User Profile](#)

**▼ Object Details**

Object Name BRAND\_V\_\_C

API Name BRAND\_V\_\_C

Type Object

Domains Product Master

Status  Enabled  
 Disabled

Updates can be made to fields and sub-objects

- Add new custom fields
- Enable or disable editable fields
  - Fields that have a toggle in the **Status** column can be enabled or disabled. Fields that do not have a toggle are read-only.
- Add sub-objects

### *Create a custom sub-object*

**Prerequisite:** A main object must exist in the data domain before you can create a custom sub-object

To create a custom sub-object in your Sandbox instance:

1. In the Admin console, click **Data Model**.
2. Open a data domain and click **+ Add Object**.
3. In the **Add Object to Domain** dialog, choose **Create a new object** and select **Sub-object**.
4. In the **Object Details** section, define the **Object Name** and **Description**.

**Note:** The **Object Name** cannot be edited after the object is saved.

The following details are read-only:

- **Type** - The object type that you chose in the **Add Object to Domain** dialog.
- **Domains** - The data domains that the sub-object belongs to. New objects list the current domain. When you edit an existing sub-object, any domain that it belongs to will display.
- **Status** - New custom objects are saved as **Disabled**. You can enable the sub-object after it is saved.



In the following sections, configure the details for the object.

5. **Fields** - Lists the default fields that are created for new custom sub-objects. After this object is saved, you can add custom fields.
6. **Labels** - Type the **Singular Name** and **Plural Name** that will be used for the custom sub-object in the Network UI for all of the languages required.
7. **Main Objects** - Choose an object to associate to this sub-object. Click **+Add Main Object** and then expand the **Label** list to choose the object. Only main objects associated with the current data domain can be selected.

Main objects cannot be removed after the sub-object is created and saved.

8. *(Optional)* **Duplicate Detection Rule** - Define the unique fields for Network to use for determining duplicates and merging custom sub-object records. By default, records are matched using keys.
9. **Source Survivorship Rules** - Define the priority of sources for the sub-object.
10. **Object Icon** - Choose the icon that will identify this object throughout the Network user interface.
11. **Save** the new custom object.

When the object is saved, it is automatically associated with the current domain. Custom sub-objects are saved as disabled. Administrators must explicitly enable the object.

After a custom sub-object has been created, the configuration can be edited in your Sandbox instance or Production instance.

**Note:** Custom sub-objects cannot be deleted after they are created.

### *Edit custom sub-objects*


After a custom sub-object has been created, the following configuration details can be edited in your Sandbox instance or Production instance.

Changes can be made to the following details:

- Description
- Labels
- Source rankings
- Object icon
- Summary fields
- Duplicate detection rules

Updates can be made to fields and main objects:

- Add new custom fields
- Enable or disable editable fields

Fields that have a toggle  in the **Status** column can be enabled or disabled. Fields that do not have a toggle are read-only.

- Add main objects; removing main objects is not supported.

Only main objects that belong to the current domain can be added.



## Create a custom relationship object

**Prerequisite:** A main object must exist in the data domain before you can create a custom relationship object

To create a custom relationship object in your Sandbox instance:

1. In the Admin console, click **Data Model**.
2. Open a data domain and click **+ Add Object**.
3. In the **Add Object to Domain** dialog, choose **Create a new object** and select **Relationship**.
4. In the **Object Details** section, define the **Object Name** and **Description**.

**Note:** The **Object Name** cannot be edited after the object is saved.

The following details are read-only:

- **Type** - The object type that you chose in the **Add Object to Domain** dialog.
- **Domains** - The data domains that the relationship object belongs to. New objects list the current domain. When you edit an existing custom relationship object, any domain that it belongs to will display.
- **Status** - New custom objects are saved as **Disabled**. You can enable this relationship object after it is saved.

In the following sections, configure the details for the object.

5. **Fields** - Lists the default fields that are created for new custom relationship objects. After this object is saved, you can add custom fields.
6. **Labels** - Type the singular **Label** and **Plural** label that will be used for the custom relationship object in the Network UI for all of the languages required.
7. **Objects in this Relationship** - Choose the main entities that are linked by this relationship object.

All relationships objects must have an owner object and a related object.

Click the **+Add Owner** link and expand the list to choose the object. Main objects from any data domain can be selected. Click the **+Add Related Object** link to choose the other main object in the relationship.

8. **Owner Object Labels** - The object name of the owner object (previously called *controlling object*) is automatically added as the perspective label in the **Label** and **Plural** fields. You can accept the name or change it. For example, if the STUDY\_\_C custom object is the owner object, you might want it to be called *Clinical Trial* from the related object's record profile.
9. **Related Object Labels** - The object name of the related object (previously called *non-controlling object*) is automatically added as the perspective label in the **Label** and **Plural** fields. You can accept the name or change it. For example, if HCP is the related object, you might want it to be called *Investigator* from the owner object's record profile.

**Note:** If more than one object is selected as the owner or as the related object, the labels are not automatically populated. You must define specific labels for those types of relationships.

For information about defining relationships with owner and related objects, see [Custom Objects](#) in the *Veeva Network Online Help*.



**▼ Objects in this Relationship**

For more information on owner and related objects and help on defining relationships, visit the [Online Help](#).

**Owner**                      **Relationship**                      **Related Object**

**▼ Owner Object Labels**

When you create a [profile layout](#) for the related objects, these labels are used by default to refer to the owner objects. For more information, visit the [Online Help](#).

Language	Label *	Plural *
English	Clinical Trial	Clinical Trials

[+ Add Language](#)

**▼ Related Object Labels**

When you create a [profile layout](#) for the owner objects, these labels are used by default to refer to the related objects. For more information, visit the [Online Help](#).

Language	Label *	Plural *
English	Investigator	Investigators

[+ Add Language](#)

10. (Optional) **Duplicate Detection Rule** - Define the unique fields for Network to use for determining duplicates and merging custom relationship object records. By default, records are matched using keys.
11. Define the priority of sources for the custom object in the **Source Survivorship Rules** section.
12. **Save** the new custom relationship object.

When the object is saved, it is automatically associated with the domain of the owning object. Custom relationship objects are saved as disabled. Administrators must explicitly enable the object.

**Note:** Custom relationship objects cannot be deleted after they are created.

### *Edit custom relationship objects*

After a custom relationship object has been created, the following configuration details can be edited in your Sandbox instance or Production instance.


Changes can be made to the following details:

- Description
- Labels for the relationship object
- Perspective labels for the owning and related objects
- Source rankings
- Object icon
- Summary fields
- Status
- Duplicate detection rules



Updates can be made to fields and the main objects in the relationships.

- Add new custom fields
- Enable or disable editable fields

Fields that have a toggle  in the **Status** column can be enabled or disabled. Fields that do not have a toggle are read-only.

- Add owner and related objects

Main objects that belong to any data domain can be added. Main objects cannot be removed after the relationship object has been created and saved.

### Configuration Management

To move custom objects from your Sandbox instance to your Production environment, export the object configurations. For more information, see the "Data Domains" topic in these *Release Notes*.

### PROFILE LAYOUT EDITOR

Administrators can now configure a profile layout to have two sections for the same relationship.

Custom relationship objects typically have one owner object and one related object. In some cases, a relationship can have more than one owner object or related object (arc relationships), or the same object can be both (recursive relationships). To support these complex custom relationships, the profile layout editor now supports having two sections for the same relationship so record profiles can display each related object.

This enhancement is enabled by default if custom objects are enabled in your Network instance.

### Example


An employee can have a manager and they can have direct reports; in this custom relationship, the EMPLOYEE custom object is both the owner object and related object (recursive relationship).



Previously, a custom relationship object could be added to a profile layout one time, so an EMPLOYEE record could display only one of the relationships - the manager or the direct reports.

Now, you can create two sections on the profile layout for the same custom relationship object so the profile page displays both sides of the relationship.





**John Smith** ☆  
ENTITY TYPE Employee  
VID 934837476649927039

Primary Information


Managers

**Direct Reports**

Record Information


External Identifiers


Managers


 **Frank Jones** ↗

+ New Manager

Direct Reports

 **Peter Miller** ↗

 **Tom Myers** ↗

 **Bob Reilley** ↗

### Using the relationship labels

To be able to select the same custom relationship object more than once, the profile layout editor uses the labels that you defined for the owner and related objects in the custom relationship object configuration.

### Example

In the EMPLOYEE example, the following labels are defined:

- When the EMPLOYEE is the related object, the owner EMPLOYEE object is called *Direct Reports*.
- When the EMPLOYEE is the owner object, the related EMPLOYEE object is called *Managers*.



▼ **Objects in this Relationship** ⓘ

For more information on owner and related objects and help on defining relationships, visit the [Online Help](#) ⓘ.

Owner	Relationship	Related Object
Employee <a href="#">+ Add Owner</a>	Employee Manager	Employee <a href="#">+ Add Related Object</a>

▼ **Owner Object Labels**

When you create a [profile layout](#) for the related objects, these labels are used by default to refer to the owner objects. For more information, visit the [Online Help](#) ⓘ.

Language	Label *	Plural *
English ▼	Direct Report	Direct Reports

[+ Add Language](#)

▼ **Related Object Labels**

When you create a [profile layout](#) for the owner objects, these labels are used by default to refer to the related objects. For more information, visit the [Online Help](#) ⓘ.

Language	Label *	Plural *
English ▼	Manager	Managers

[+ Add Language](#)

The *Direct Reports* and *Managers* labels are used in the profile layout editor to distinguish these relationships.

### **Add the relationships to the profile layout**

To add the custom relationship object to the profile layout:

1. In the Admin console, click **Data Model > Profile Layouts**.
2. Select your custom profile layout from the list. Veeva standard layouts are read-only.
3. Click **+ Add Section**.
4. In the **Add Section** dialog, expand the **Object** list and select the owner object label for the custom relationship object.

**Add Section** ⓘ

Object * ⓘ	Employees ▲
Section ID * ⓘ	Direct Reports
Description ⓘ	Managers
Labels * ⓘ	Custom Fields
	Addresses

[Add](#)





Note that these perspective labels display only for complex relationships (arc relationships and recursive relationships); for typical relationships, the relationship object label (for example, *Parent HCO*) would display.

5. In the new section, add the fields that apply to this relationship.

**GlobalEmployee**  
Global Employee Profile  
Created On 2019-12-30 01:24:50 EST • Created by admin@verteo.veevanetwork.com

+ Add Section Search fields... [Q] [G]

- > Profile Header [K]
- > Primary Information
- ∨ **Managers**
  - ∨ [G] Employee Manager
    - ∨ **Employee**
    - ∨ **Entity Type**
    - > [C] Custom Fields (Employee Manager) [I]
    - [K] Custom Keys
- ∨ **Direct Reports**
  - ∨ [G] Employee Manager
    - ∨ **Entity Type**
    - ∨ **Employee**
    - > [C] Custom Fields (Employee Manager) [I]

6. Repeat steps 4 and 5 to add the related object section.



### Profile page

After the profile layout is configured, the profile page displays the two sections for the custom relationship object.

**John Smith** ☆  
 ENTITY TYPE Employee  
 VID 934837476649927039

- Primary Information
- Managers
- Direct Reports**
- Record Information
- External Identifiers

**Managers**

- Frank Jones
- + New Manager

**Direct Reports**

- Peter Miller
- Tom Myers
- Bob Reilley

## Network integrations

### STATE LICENSE MAPPINGS

The RXA eligible information is now available when you download an account using Network Account Search and when you import an account from a New Account DCR. In version 19R3.0, the Network State License Mappings was updated to include the `rxa_eligible__v` because sample eligibility and prescriptive authority can be different, depending on state laws.

**Note:** More information will be available in the *Veeva CRM 20R1.0 Release Notes*.



## UPSERT TO CRM

Customers that use Network and Veeva CRM can now push object data from Network's FTP server to CRM. Previously, users had to manually transfer the files to CRM.

This feature is enabled by default in your Network instance.

### Overview of tasks

To upsert data to CRM, the following tasks must be completed:

- **Add Salesforce credentials to Network** - The credentials are used to connect to Veeva CRM.
- **Create a connector** - Create a connection to push object data from Network's FTP server to Veeva CRM.

The following sections describe how to complete these tasks.

### Add Salesforce credentials

Add the Salesforce credentials so they are saved in Network and you can refer to them when you are creating the Veeva Connector configuration for CRM.

External Credentials > New External Credential

### New External Credential

Cancel Save

Type Salesforce

Name Verteo CRM US

Username jennifer.stevens@verteo.com

Password .....

Security Token (Optional)

URL  https://test.salesforce.com

Test Connection

To add the Salesforce credentials:

1. In the Admin console, click **Settings > External Credentials**.
2. Click **Add Credentials**.
3. In the **New External Credential** dialog, select **Salesforce**. Click **OK**.



4. On the New External Credential page, provide the following information:
  - a. **Name** - Type a name for the credential. For example, *Verteo CRM US*. Names must be unique.
  - b. **Username** - The CRM integration user ID.
  - c. **Password** - The password for the CRM integration user.
5. In the **URL** list, choose one of the following URLs for the Salesforce domain:
  - `https://login.salesforce.com` - Use for production instances.
  - `https://test.salesforce.com` - Use for test instances.
6. Click **Test Connection** to ensure that the credentials are correct.

Messages will display at the top of the page to indicate if the credentials are valid or invalid, or if there were issues connecting to the Salesforce server (not credential-related).
7. **Save** your changes. If you did not test the credentials, they will be tested now. Invalid credentials will not be saved.

The credentials are stored and can be used in the Veeva Connector configuration for CRM.

### *Create a connector to Veeva CRM*

Create a Veeva Connector so you can push object data to CRM.

1. In the Admin console, click **System Interfaces > Veeva Connector**.
2. Click **Add Veeva Connector**.
3. In the **Add Veeva Connector** dialog, expand the lists to select the following values:
  - **Connector Type** - CRM
  - **Operation** - UpsertClick **Next**.
4. In the **Details** section, define the following information:
  - **Connector Enabled** - Choose **Yes**.

When the connector is enabled, you can test the connection between Network and the CRM org and you can push data to CRM.
  - **Name** - Type a meaningful name for the connector.
  - **System** - Choose a system. If you do not have a system configured for CRM, create one by navigating to **System Interfaces > Systems**



▼ Details

Connector Enabled  Yes  No

Name

System

Connector Type CRM

Operation Upsert ?

▼ Connection Settings

CRM Credential ?

- Choose the Salesforce credentials in the **Connection Settings** section so Network can connect to CRM.

Click **Test Connection** to ensure that the credentials are valid.

- In the **Upsert Settings** section, define the Network FTP path where the .csv file will be extracted from and pushed to CRM.

The FTP path can specify a directory, path, or a specific .zip filename. Directory paths must end in a forward slash (/). Wildcard characters are supported for .zip filenames. If you specify a path and there are multiple files, the most recent file will be used during the job.

**Tip:** You can specify the filename of scheduled target subscription, or the path where an exported report is stored.

**FTP path examples**

Type	Path	Description
Wildcard .zip file	outbound/VCRM/crm_target_us/exp*.zip	The Veeva Connector will find the most recent .zip file in the <code>crm_target_us</code> folder that starts with <code>exp</code> .
Target subscription	outbound/VCRM/crm_target_us/	Specify the directory path of a scheduled target subscription.
Network Reporting	outbound/report/organizationreport/	A Network report export can be configured to export a specific FTP path. Since Network reporting always exports to a unique subfolder, specify the path of the root folder.  The connector will find the most recent zip file in the <code>organizationreport</code> folder or subfolders



7. Beside **Objects**, specify the objects that will be pushed to CRM. For each object, define the following details:
  - **Source File** - The name of the file. If more than one file exists in the FTP folder, the latest file will be read.
  - **CRM Object** - The CRM object name; for example, `Publication__c`.
  - **Field Mappings** - Map a lookup to the CRM fields so you can load sub-objects and relationship objects from Network. Lookups are references to other objects.
    - **File Column Header** - The Network field name. For example, `vid__v`.
    - **CRM Field** - The CRM field name. For example, `External_ID_vod__c`.
    - **ID Field** - The ID field that you want to use to upsert CRM data. The ID field should either be the Salesforce ID field or External ID field. If a match isn't found using the ID field, a new record is created.



FTP Path outbound/VCRM00DZ0000001DG0jMAG/crm\_target\_us/

Objects

**Source File**

publication\_\_c.csv

**CRM Object**

Publication\_\_c

**Field Mappings**

FILE COLUMN HEADER	CRM FIELD	ID FIELD
vid__v	External_ID_vod__c	<input checked="" type="checkbox"/>
publication_name__c	Title__c	<input type="checkbox"/>
publication_type__c	Publication_Type_vod__c	<input type="checkbox"/>
PubMed_ID__c	PubMed_ID_Name_vod__c	<input type="checkbox"/>
PubMed_URL__c	PubMed_URL_vod__c	<input type="checkbox"/>
journal__c	Journal__c	<input type="checkbox"/>

[+ Add Mapping](#)

Remove Cancel Done

**Source File**

stakeholder\_publication\_rel\_\_c.csv

**CRM Object**

Stakeholder\_Publication\_vod\_\_c

**Field Mappings**

FILE COLUMN HEADER	CRM FIELD	ID FIELD
vid__v	External_Id_vod__c	<input checked="" type="checkbox"/>
entity_vid__v	Account_Id_vod__r:Network_External_Id__c	<input type="checkbox"/>
related_entity_vid__v	Publication_ID_vod__r:External_ID_vod__c	<input type="checkbox"/>
authorship_position__c	Authorship_Position_vod__c	<input type="checkbox"/>
participant__c	Participant_vod__c	<input type="checkbox"/>

[+ Add Mapping](#)

Remove Cancel Done

[+ Add Object](#)

To include another mapping for the same object, click **+ Add Mapping**.

To include more objects, click **+ Add Object**. You can order which object is loaded first using the handle beside **Source File**.



8. In the **Job Trigger Configuration** section, define the schedule for the job and any subsequent actions that will start when this job finishes.

**Job Schedule** - Run the job manually or on a scheduled basis. If you select **Manual**, the job only runs when you click the **Start Job** button on the configuration page.

**Job Triggers** - Trigger other actions to start after a job runs.

Available triggers:

- **Send email** - Specify users that should be notified for successful and unsuccessful job outcomes.
- **Start a job** - Start a subsequent job when this job successfully completes.

For more information, see [Subscription job triggers](#).

9. **Save** your changes.

The Veeva CRM integration is complete. When the upsert job runs, Network will connect to CRM to push the object data from Network's FTP server.

## **UPSERT TO VAULT**

Customers that use Network and Veeva Vault can now push object data from Network's FTP server to their Vault application. Previously, users had to manually transfer the files to Veeva Vault.

This feature is enabled by default in your Network instance.

### *Overview of tasks*

To upsert data to Vault, the following tasks must be completed:

- **Add Vault credentials to Network** - The credentials are used to connect to Veeva Vault.
- **Create a connector** - Create a connection to push object data from Network's FTP server to Veeva Vault.

The following sections describe how to complete these tasks.





## Add Vault credentials

Add the login credentials for your Vault application so they are saved in Network and you can refer to them when you are creating the Veeva Connector configuration for Vault.

External Credentials > New External Credential

### New External Credential

Type Vault

Name Verteo Vault US

Username jennifer.stevens@verteo.com

Password \*\*\*\*\*

URL https://verteo-veevavault.com

Test Connection

Cancel Save

To add the Vault credentials:

1. In the Admin console, click **Settings > External Credentials**.
2. Click **Add Credentials**.
3. In the **New External Credential** dialog, select **Vault**. Click **OK**.
4. On the New External Credential page, provide the following information:
  - a. **Name** - Type a name for the credential. For example, *Verteo Vault US*. Names must be unique.
  - b. **Username** - The user name to log into your Vault application.
  - c. **Password** - The password for the Vault user.
5. In the **URL** list, type the URL for your Vault application:
6. Click **Test Connection** to ensure that the credentials are correct.

Messages will display at the top of the page to indicate if the credentials are valid or invalid, or if there were issues connecting to the Vault server (not credential-related).

7. **Save** your changes. If you did not test the credentials, they will be tested now. Invalid credentials will not be saved.

The credentials are stored and can be used in the Veeva Connector configuration for Veeva Vault.

## Create a connector to Veeva Vault

Create a Veeva Connector so you can push object data to Vault.

1. In the Admin console, click **System Interfaces > Veeva Connector**.
2. Click **Add Veeva Connector**.
3. In the **Add Veeva Connector** dialog, expand the lists to select the following values:



- **Connector Type** - Vault
- **Operation** - Upsert

Click **Next**. The new Vault connector page displays.

- In the **Details** section, define the following information:
  - **Connector Enabled** - Choose **Yes**.  
When the connector is enabled, you can test the connection between Network and the Vault org and you can push data to Vault.
  - **Name** - Type a meaningful name for the connector.
  - **System** - Choose a system. If you do not have a system configured for Vault, create one by navigating to **System Interfaces >Systems**.
- Choose the Vault credentials in the **Connection Settings** section.

Click **Test Connection** to ensure that the credentials are valid.

- In the **Upsert Settings** section, define the Network FTP path that will store the .csv files that will be extracted from Network and pushed to Vault. The path can include subdirectories. Wildcard characters are also supported.

The FTP path can specify a directory, path, or a specific .zip filename. Directory paths must end in a forward slash (/). Wildcard characters are supported for .zip filenames. If you specify a path and there are multiple files, the most recent file will be used during the job.

**Tip:** You can specify the filename of scheduled target subscription, or the path where an exported report is stored.

**FTP path examples**

Type	Path	Description
Wildcard .zip file	outbound/VaultGrants/vault_grants_export/exp*.zip	The Veeva Connector will find the most recent .zip file in the vault_grants_export folder that starts with exp.
Target subscription	outbound/VaultGrants/vault_grants_export/	Specify the directory path of a scheduled target subscription.
Network Reporting	outbound/report/organizationreport/	A Network report export can be configured to export a specific FTP path. Since Network reporting always exports to a unique subfolder, specify the path of the root folder.  The connector will find the most recent zip file in the organizationreport folder or subfolders



7. Beside **Objects**, specify the objects that will be pushed to Vault. For each object, define the following details:
- **Source File** - The name of the file. If more than one file exists in the FTP folder, the latest file will be read.
  - **Vault Object** - The Vault object name; for example, `product__v`.
  - **Field Mappings** - Map a lookup to the Vault fields so you can load sub-objects and relationship objects from Network.


Lookups are references to other objects. In Network, sub-objects and relationship objects contain Network entity ID references to other objects. In Vault, Parent Object and Object fields are references to other objects (for example, `applicant__c`, `application__c`).

- **File Column Header** - The Network field name. For example, `entity_vid__v`.
- **Vault Field** - The Vault field name. For example, `application__c.application_number__v`.
- **Key Field** - The field that you want to use for an exact match to the Vault data. The **Key Field** should be either the Vault ID field or a field configured where values must be unique.

The screenshot shows the 'Upsert Settings' configuration page. At the top, the 'FTP Path' is set to `/outbound/PromoMat/product_data_export/exp_*.zip`. Below this, the 'Objects' section contains a list with one entry: 'Source File' with a value of `product__c.csv`. The 'Vault Object' is set to `product__v`. The 'Upsert Mappings' section features a table with three columns: 'FILE COLUMN HEADER', 'VAULT FIELD', and 'KEY FIELD'. Two mappings are shown: one for `vid__v` mapping to `external_id__v` (marked as a key field with a checked box), and another for `product_name__c` mapping to `name__v` (not marked as a key field). A '+ Add Mapping' button is located below the table, and 'Remove', 'Cancel', and 'Done' buttons are at the bottom right.

FILE COLUMN HEADER	VAULT FIELD	KEY FIELD
<code>vid__v</code>	<code>external_id__v</code>	<input checked="" type="checkbox"/>
<code>product_name__c</code>	<code>name__v</code>	<input type="checkbox"/>

To include another mapping for the same object, click **+ Add Mapping**.

To include more objects, click **+ Add Object**. You can order which object is loaded first using the handle  beside **Source File**.



8. In the **Job Trigger Configuration** section, define the schedule for the job and any subsequent actions that will start when this job finishes.

**Job Schedule** - Run the job manually or on a scheduled basis. If you select **Manual**, the job only runs when you click the **Start Job** button on the configuration page.

**Job Triggers** - Trigger other actions to start after a job runs.

Available triggers:

- **Send email** - Specify users that should be notified for successful and unsuccessful job outcomes.
- **Start a job** - Start a subsequent job when this job successfully completes. Use trigger a target subscription to load the Network data into Vault. when the Vault push job completes.

For more information, see [Subscription job triggers](#).

9. **Save** your changes.

The Veeva Vault integration is complete. When the upsert job runs, Network will connect to Vault to push the object data from Network's FTP server.

### *Configuration management*

Administrators can export a Veeva Connector to a target environment. CRM and Vault upsert configurations can be exported but credentials and schedules cannot; schedules and credentials must be defined on the target instance.

For more information, see [Exporting configurations](#) in the *Veeva Network Online Help*.

## **NETWORK BRIDGE**

The following enhancements have been added for the Network Bridge in this release.

**Note:** The previous version of the CRM bridge that uses the CRM Data Subscription will be sunset in Veeva CRM version 20R3.

### *Enabling and disabling subscriptions*

Administrators and data managers can now disable Network Bridge subscriptions. This enhancement gives administrators more control for managing their Network Bridge subscriptions; for example, subscriptions that are no longer used, or that are seldom used, can be disabled so they no longer display on the subscription list page.

When a Network Bridge subscription is disabled, the following behavior occurs:

- Scheduled jobs do not run (in the Network UI or the API).
- Job triggers that are set for this subscription do not run.
- New job triggers cannot be added for the disabled subscription.
- The subscription is removed from the list on its subscription list page.



Network Bridge subscriptions can be enabled again after they have been disabled. When a disabled subscription is enabled again, any schedules or job triggers on the subscription will be active again; schedules will run at the set time and jobs will be triggered when the conditions are met.

### Disable subscriptions

Subscriptions can be enabled or disabled in two ways:

- **Network Bridge page** - Click the icon in the **Status** column.

NAME ^	DATA SOURCE	COUNTRY	SCHEDULE	LAST JOB TIME	LAST JOB STATUS	STATUS
<a href="#">crm_bridge_au</a>	VCRM-APAC	Australia (AU)	Manual			✘
<a href="#">crm_bridge_es</a>	VCRM-EU	Spain (ES)	Manual			✔
<a href="#">crm_bridge_gb</a>	VCRM-EU	United Kingdom (GB)	Scheduled			✔
<a href="#">crm_bridge_us</a>	VCRM-US	United States (US)	Manual	2020-01-17 01:43:00 EST	COMPLETE	✔

- **Network Bridge configuration page** - Choose an option beside the **Status** heading.

crm\_bridge\_au Details Clone Start Cancel Save

▼ Details

Name

Type CRM Data Subscription ?

Status  Enabled  Disabled

### Manage disabled subscriptions

After a Network Bridge subscription is disabled, it no longer displays in the list on the Network Bridge page; only **Enabled** subscriptions display by default. The **Show Disabled Subscriptions** checkbox displays a count if there are any disabled subscriptions. Click the checkbox to add disabled subscriptions back to the list.



### Network Bridge

Search subscriptions   Show Disabled Subscriptions (1) Add Subscription

NAME ^	DATA SOURCE	COUNTRY	SCHEDULE	LAST JOB TIME	LAST JOB STATUS	STATUS
<a href="#">crm_bridge_es</a>	VCRM-EU	Spain (ES)	Manual			✓
<a href="#">crm_bridge_gb</a>	VCRM-EU	United Kingdom (GB)	Scheduled			✓
<a href="#">crm_bridge_us</a>	VCRM-US	United States (US)	Manual	2020-01-17 01:43:00 EST	COMPLETE	✓

If **Show Disabled Subscriptions** is not selected, disabled subscriptions cannot be found using the search field.

### Network Bridge page

The Network Bridge page is updated to include the country and status for each subscription in the list.

### Network Bridge

Search subscriptions   Show Disabled Subscriptions (1) Add Subscription

NAME ^	DATA SOURCE	COUNTRY	SCHEDULE	LAST JOB TIME	LAST JOB STATUS	STATUS
<a href="#">crm_bridge_au</a>	VCRM-APAC	Australia (AU)	Manual			✗
<a href="#">crm_bridge_es</a>	VCRM-EU	Spain (ES)	Manual			✓
<a href="#">crm_bridge_gb</a>	VCRM-EU	United Kingdom (GB)	Scheduled			✓
<a href="#">crm_bridge_us</a>	VCRM-US	United States (US)	Manual	2020-01-17 01:43:00 EST	COMPLETE	✓

**Note:** The previous version of the CRM bridge that uses the CRM Data Subscription will be sunset in Veeva CRM version 20R3.



## Admin settings

### WORKFLOW SETTINGS

Administrators now have more flexible workflow setting options for Veeva standard objects. Previously, the settings could be configured by HCO Type and HCP Type only. The options are now expanded to include any reference type field and can be configured to include multiple fields and criteria for each object. Using these options, you can be more specific about the records that are auto-approved or records that are returned to local data stewards if rejected by Veeva OpenData.

#### Example

▼ Auto-Approve Add Requests for New Customer Owned Records

HCP  All Add Requests will be sent to the local inbox for review  
 All Add Requests will be automatically approved by the system  
 Configure which Add Requests will be automatically approved by the system

Add Requests that meet **any** of the following criteria will be automatically approved by the system. ⓘ

FIELD	VALUE	
HCP Type ▼	Dentist ×	🗑️
Specialty 1 ▼	Dental Anesthesiology × Dental Oncology × Dental Public Health × Dentistry ×	🗑️

+ Add Field

This enhancement is available in your Network instance by default.

#### Updated workflow settings

The following workflow settings have been updated to include the expanded criteria options:

- **Auto-Approve Add Requests for New Customer Owned Records**
- **Auto-Approve Change Requests for Customer Owned Records**
- **Review OpenData Rejection of Add Requests**

The options in each workflow setting section have also been reworded for clarity. Any settings that you had previously defined are retained with these updates.



### *Defining criteria for workflow settings*

The updates apply to Veeva standard objects only (HCOs and HCPs).

To define workflow settings for an object:

1. In the Admin console, click **Settings > Workflow Settings**.

The page now opens in edit mode.

2. In any of the updated sections, choose the **Configure** option for HCP or HCO. For example, in the **Auto-Approve Add Requests for New Customer Owned Records** section, beside **HCP** choose **Configure which Add Requests will be automatically approved by the system**.
3. Expand the **Field** list and select a field. Only reference type fields are supported.

If you had previously defined specific HCP types for auto-approval, they will be listed here.

4. In the **Value** list, select all of the values that apply.
5. Click **+ Add Field** to choose more criteria.

If you define more than one field, records that meet any of the defined fields and values will be accepted in the workflow; the criteria is treated as an OR condition.

6. **Save** your changes.

## **API**

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### **VERSION UPDATE**

The Network API is updated to v20.0.

Currently, there are no changes from v19.0. As with all version updates, integration users should continue to use v19.0 until there is a change for v20.0 that they want to apply.

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