Veeva Network

Veeva Network 21R2.0.1 Release Notes

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About these Release Notes

These Release Notes describe all features that are included in Veeva Network 21R2.0.

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

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

Browser requirements

These are the minimum browser requirements for Veeva Network:

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

Veeva Network is not supported on mobile devices.

Release Note updates

The following feature has been added since the Early Release Notes document was published.

- **Multi-country Network Bridge** - Administrators can configure a Network Bridge to manage and maintain the CRM data subscription process for multiple countries.

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 21R2.0 major release.

			ST	DS	DM	AD
General updates						
HCO icons	New icons have been added for HCOs to help you easily differentiate the HCO types.	21R1.1	•	•	•	•
Chinese names	Chinese full names that contain the special interpunct (.) character will now be split into the first name and last name fields.	21R1.1	•	•	•	•
Network Portal						
Advanced settings - Search widget	The Search widgets settings in applications are updated to include options for restricting search results, downloading, and editing records.	21R1.1	•	•	•	•
Advanced settings - Affiliation widget	The Affiliation widget settings for applications are updated to include options for restricting editing and for displaying HCO metrics.	21R1.1	•	•	•	•
Network widgets - General						
Widget profile layouts	Administrators can configure custom profile layouts to simplify add and change requests submitted through Network widgets	21R2.0	•	•	•	•
Profile layouts - Primary country	The primary country field is added to the predefined NetworkWidgetsLayoutHCO and NetworkWidgetsLayoutHCP profile layouts.	21R1.1	•	•	•	•
Affiliation widget						
Influence map screenshots	Use the new Take Screenshot tool to download a high quality image of the current view.	21R2.0	•	•	•	•
Reports	Advanced reporting users can report on the Affiliation widget data using the new tables in the SQL Query Editor.	21R2.0		•	•	•
Font size	The text and nodes on the Influence Map have been re-sized to improve readability.	21R2.0	•	•	•	•

			ST	DS	DM	AD
Bulk editing	Users can select multiple HCP and HCO accounts to reposition, copy to another view, or remove from the current view.	21R1.1	•	•	•	•
Display relationship info	You can now choose how to display relationship information on the Influence Map.	21R1.1	•	•	•	•
Reposition labels	The relationship labels on the connecting lines between two entities can be repositioned.	21R1.1	•	•	•	•
Filter by HCP/HCO	HCPs and HCOs can be filtered on the Influence Map.	21R1.1	•	•	•	•
Edit profiles	Records can be updated directly from the profile preview.	21R1.1	•	•	•	•
Account List updates	The entity layout field for HCPs now displays on records in the Account List.	21R1.1	•	•	•	•
Remove standard views	Standard views can no longer be deleted from the Influence Map.	21R1.1	•	•	•	•
Full screen support	The Affiliation widget is supported in full screen mode for Salesforce Classic™.	21R1.1	•	•	•	•
Search widget						
Search local records only	A new property can be used to limit search results to records in your Network instance.	21R1.1	•	•	•	•
Data components						
View external data in Network	Use this new feature to view HCP, HCO, and custom object data from Salesforce in your Network instance.	21R1.1	•	•	•	•
Inbox						
Inbox sorting	The inbox is updated to add sorting ability to more columns.	21R2.0		•	•	•
Date completed	Data change requests and suspect match tasks now display the date and time that the task was completed.	21R2.0		•	•	•

			ST	DS	DM	AD
Reports						
Reporting database improvements	Infrastructure improvements have been made to the Network reporting feature.	21R2.0			•	•
SQL Query Editor	You can now drag and drop tables, fields, and reference codes from the tree view into the query box.	21R1.1			•	•
Reporting permissions	Use a new user permission called Report results to run reports without any data restrictions applied.	21R1.1			•	•
Profile layouts						
Usability enhancements	Profile layouts are updated to provide more information about each configuration and where it is being used.	21R1.1			•	•
Source subscriptions						
Wizard mode	The wizard is enhanced to support feeds that contain multiple objects of different types and the relationships between them.	21R2.0			•	•
Loading relationships	Parent HCOs will be dropped or rejected if the related entity does not have a Valid record state.	21R1.1			•	•
Target subscriptions						
Export data to cloud storage	Target subscriptions can export data directly to your private cloud storage. In this release, Amazon S3™ is supported.	21R2.0			•	•
Match						
Formatted name field	The formatted name field for HCPs is now available to add to data groups and match rules in match configurations.	21R1.1			•	•
Data validation rules						
Custom object support	Rules can now be created for custom objects.	21R1.1			•	•
Operand support for field sets	Operands can be used for field sets to create rules to check for a specific count of sub-objects or relationship objects.	21R1.1			•	•
Data validation rules page	The page is updated so you can more easily view the objects and rules.	21R1.1			•	•

			ST	DS	DM	AD
Disabling fields	When you disable a data model field, the confirmation message now lists the impacted data validation rules.	21R1.1			•	•
Profile page updates	The right pane on record profiles remains fixed so Data Stewards can view data validation issues as they scroll.	21R1.1	•	•	•	•
Data Model						
Formatted name	A custom calculation has been added for HCP names for Singapore.	21R2.0			•	•
New countries supported	A data model has been added for Albania, Ecuador, Peru, and South Korea.	21R2.0			•	•
Data privacy opt out	Albania, Australia, and Singapore have been added to the list of countries that Veeva OpenData supports for opted-out HCPs.	21R2.0			•	•
Data privacy opt out date	The data_privacy_opt_out_date__v field will become read-only in version 21R3.0.	21R2.0			•	•
ERD view	The ERD view is updated to improve readability for large data models.	21R2.0			•	•
Network integrations						
Network Bridge migration	Network instances that use the CRM Data Subscription to export data from Network to CRM will be migrated to the Network Bridge by October 1, 2021	21R2.0			•	•
Multi-country Network Bridge	Administrators can configure a Network Bridge to manage and maintain the CRM data subscription process for multiple countries.	21R2.0			•	•
Configuration management						
Custom object dependencies	Additional data domains can be removed from export packages if there is at least one domain remaining in the package.	21R1.1				•
Opt out match settings	The Opt Out Matching Settings can now be exported to target environments.	21R1.1				•

			ST	DS	DM	AD
API						
Version update	The Network API is updated to v24.0.	21R2.0		Developers		
Batch Approve/Reject Change Request	You can now insert resolution note comments or codes for each data change request (DCR) when they are automatically accepted or rejected using the Batch API calls.	21R1.1		Developers		

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

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

General updates

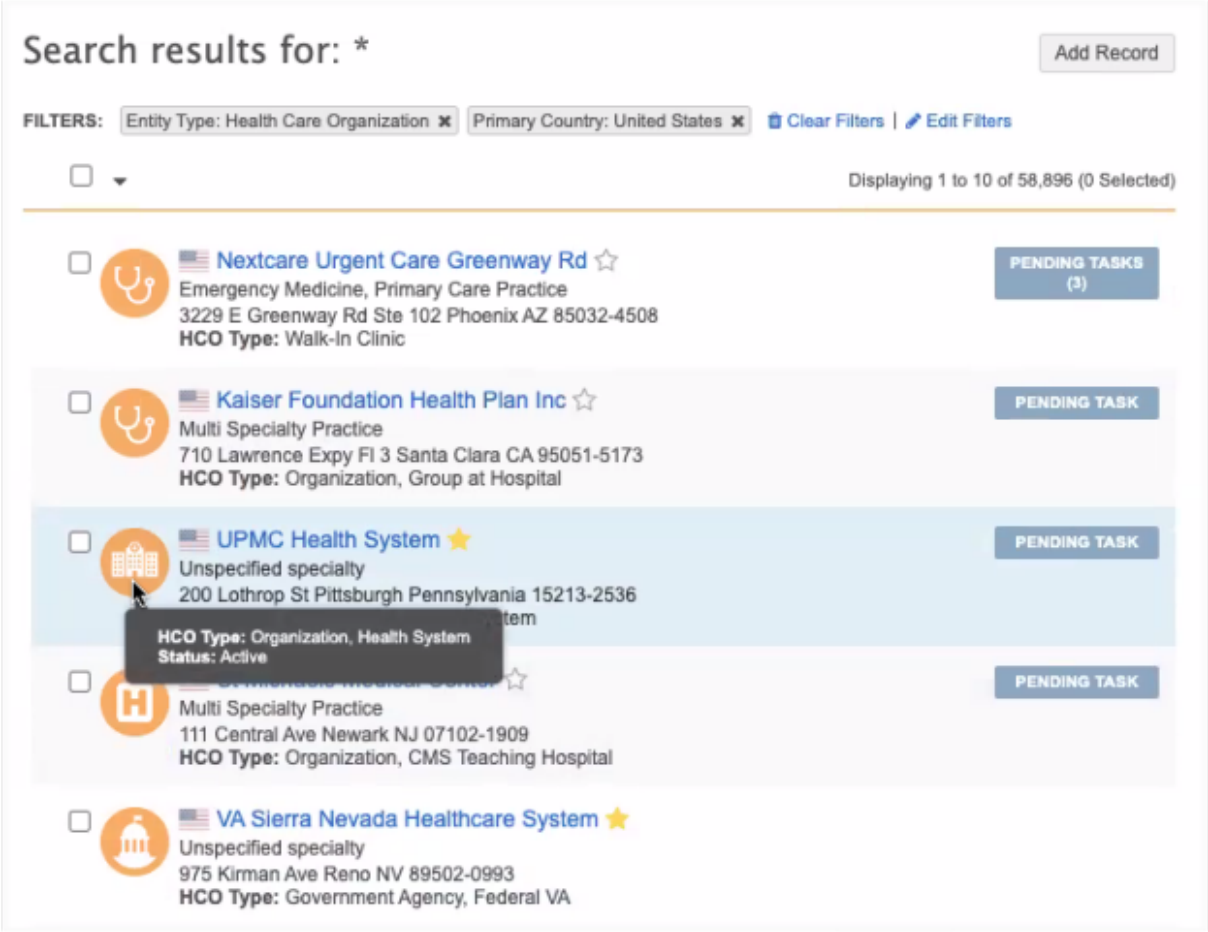
HCO ICONS

21R1.1

The HCO type icons have been extended to include HCO types that are commonly used in Europe. In addition, new icons have been added to improve branding for dentistry and infusion centers.

The HCO icons help you easily differentiate HCO types when HCOs have the same name. They are used for all record owner types (local, Veeva OpenData, third party data providers) and all record states.

These new specific HCO icons will be used throughout the Network UI, the Network Portal, and Network widgets. They are enabled by default.



New HCO icons

New icons have been added to identify dentistry and infusion centers.

HCO Type		HCO Type Name	Reference Code
Dentistry		Organization, Dentistry Group	4:18
Infusion Centers		Dialysis & Infusion Center	29:1
		Blood Transfusion Centers	3_6
		Dialysis & Infusion Centers, Other	29:98
		Dialysis & Infusion Centers, Corporate Office	29:99
		Dialysis & Infusion Centers, Hospital-based Dialysis/Infusion	29:2

New icon mappings to HCO type

HCO types that are commonly used in Europe have been mapped to the existing HCO icons.

HCO Type		HCO Type Name	Reference Code
Distributor		Distributors, General	4_4
Extended Care		Hospice	4_71
		Nursing Home with Pharmacy	NHP
Government Agency		Health Care System Administration, Government Health Administration	36_1
		Health Care System Administration, Other Administration Agencies	36_4
		Health Authority/Board	28:1
		Government Agency, Federal Public Health Service	26:11
		Organization, Government	4:13
Group Practice		Primary-level Medical and Health Care Institutions, Community Health Service Center	3_2
		Primary-level Medical and Health Care Institutions, Village Clinic	3_1
		Primary-level Medical and Health Care Institutions, Clinic/Healthy Center	3_4
		Organization, Single Private Practice	4_91
		Organization, Shared Practice	4_41

HCO Type		HCO Type Name	Reference Code
Health Systems		Legal owning entity of hospitals and clinics	LE
		NHS Trust	36_10
		Commissioning Region	36_7
		Clinical Commissioning Group	36_6
		Area Team	36_5
		Health Boards/Trusts (Devolved UK nations)	HB
Hospital		Hospital, Other Specialized	32_11
		Hospital, Teaching and University	4_56
		Hospital, Oncology	1_21
		Hospital, Dermatology	1_10
		Hospital, Military	1_1
Hospital Department		Organization, Clinic at Hospital	4:7
		Department	5
Institution		Medical School, Pharmacy	14:10
		Medical School, Nursing	14:6
		Medical School, Dental	14:5
		Medical School, Psychology	14:14
Laboratory		Ancillary Services, Medical and Diagnostic Laboratories	33_2
Pharmacy		Drugstore (OTC Only)	11_13
		Pharmacy, Large Retail Chain	11_15
		Pharmacy, Retail Multiple	11_16
		Pharmacy, Community	11_18
		Pharmacy Group	11_14

HCO icon use in the Network UI

The HCO type icons display wherever icons are used in the Network UI; for example, on record profiles, search results, the inbox, Network Explorer, Recent items, and so on.

Note: Any HCOs that were in your **Recent Items** before this release will continue to display the standard HCO icon until you reopen the record.

For more information about where HCO type icons are used, see HCO icons in the *Veeva Network Online Help*.

CHINESE NAMES

21R1.1

Chinese full names that contain the special interpunct (.) character will now be split into the first name and last name fields. Previously, the full name was copied into the first name field only. Now, names that contain this special character will be used to split the full name into first name and last name fields.

This enhancement is enabled by default in your Network instance.

Previous behavior

Previously, Chinese full names were copied to the first name field only.

Full name	Last Name	First Name
阿达莱提.夏吾东(Ada Lai Ti. Xia Wu Dong)		阿达莱提.夏吾东(Ada Lai Ti. Xia Wu Dong)

New behavior

The full name is split at the special (.) character. The last name is the full name value before the interpunct character (.) and the first name is populated with the value after the special character.

Full Name	Last Name	First Name
阿达莱提.夏吾东(Ada Lai Ti. Xia Wu Dong)	阿达莱提 (Ada Lai Ti)	.夏吾东 (.Xia Wu Dong)

Note: This enhancement does not impact Chinese names that do not contain the special character.

Network Portal

The Advanced Settings for the Search widget and Affiliation widget have been updated to include specific settings to customize your Network Portal applications.

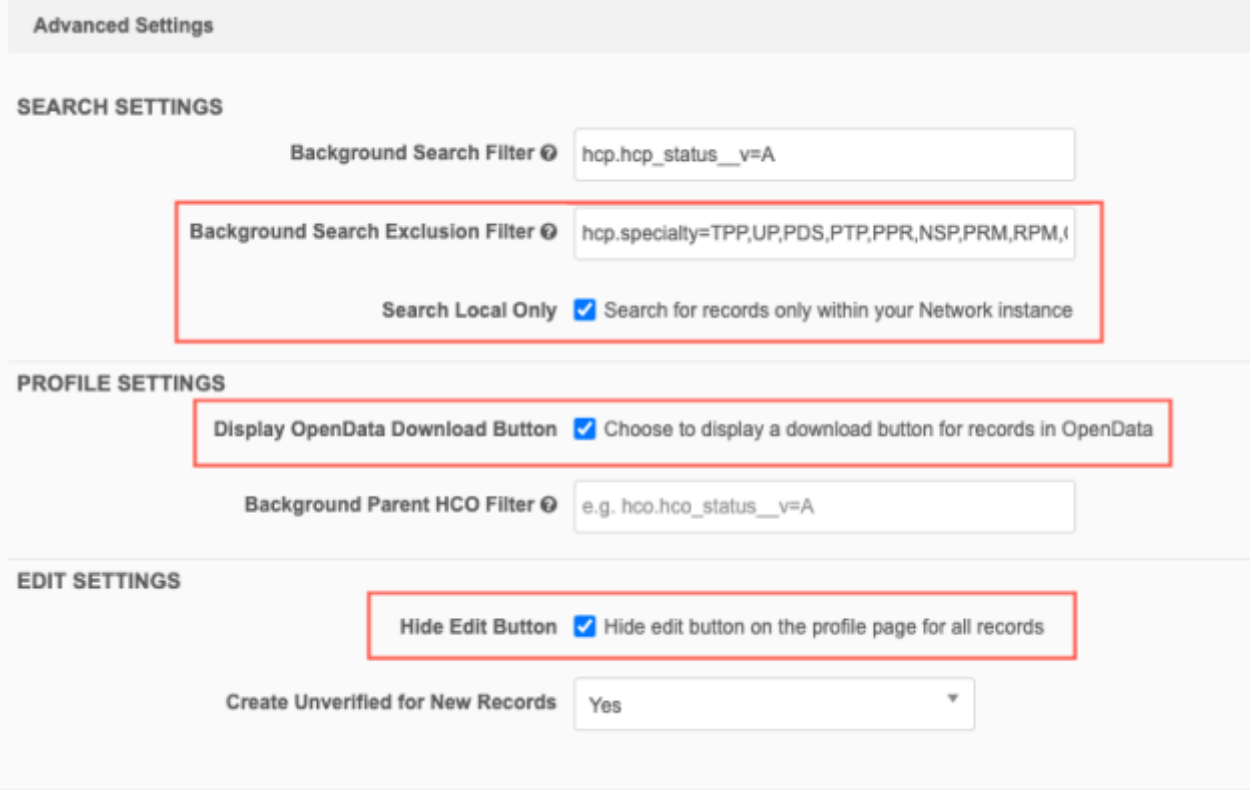
ADVANCED SETTINGS - SEARCH WIDGET

21R1.1

In Network Portal applications, the **Advanced Settings** section for Search widgets is updated to include specific settings for searching, downloading, and editing records.

New advanced settings

- **Search Local Only** - Search results display records that exist only in your Network instance. Records that have not yet been downloaded from Veeva OpenData will not display. This can help to reduce search results and prevent users from seeing results that are not relevant.
- **Background Search Exclusion Filter** - Excludes specific records from all search results.
- **Display OpenData Download Button** - Choose whether users can see the option to download the record from Veeva OpenData.
- **Hide Edit button** - Do not display the Edit button on the profile page to prevent users from making changes to data.



These settings are available by default. You can choose to enable each setting for your Network Portal application.

Enable the settings

In the Admin console, click **Widgets & Portal > Network Portal**.

1. On the Network Portal page, open an application that contains a Search widget; for example, the Search Accounts application.

   In the **Widget Configuration** section, the defined Search widget contains the **Advanced Settings**.

2. Select any settings that you want to add to customize your application.
3. **Save** your changes.

Search settings

Search local records

Administrators can choose the **Search Local Only** setting to restrict search results to records in your Network instance. By default, this setting is not selected. Using this setting returns a significantly fewer number of results and prevents users from seeing records that might not be relevant.

Note: This setting affects the Search widget in the Network Portal application only, but there is now a property that you can add to Search widgets for other internal applications. For more information, see the "Search widget" topic in these *Release Notes*.

Background Search Exclusion Filter

Use this setting to exclude specific records from all search results. For example, if the product and therapeutic area for the health system does not apply to HCPs in pediatric medicine, you can exclude those records from all searches.

This filter uses API syntax.

Example API syntax to exclude HCPs with specialize in pediatrics

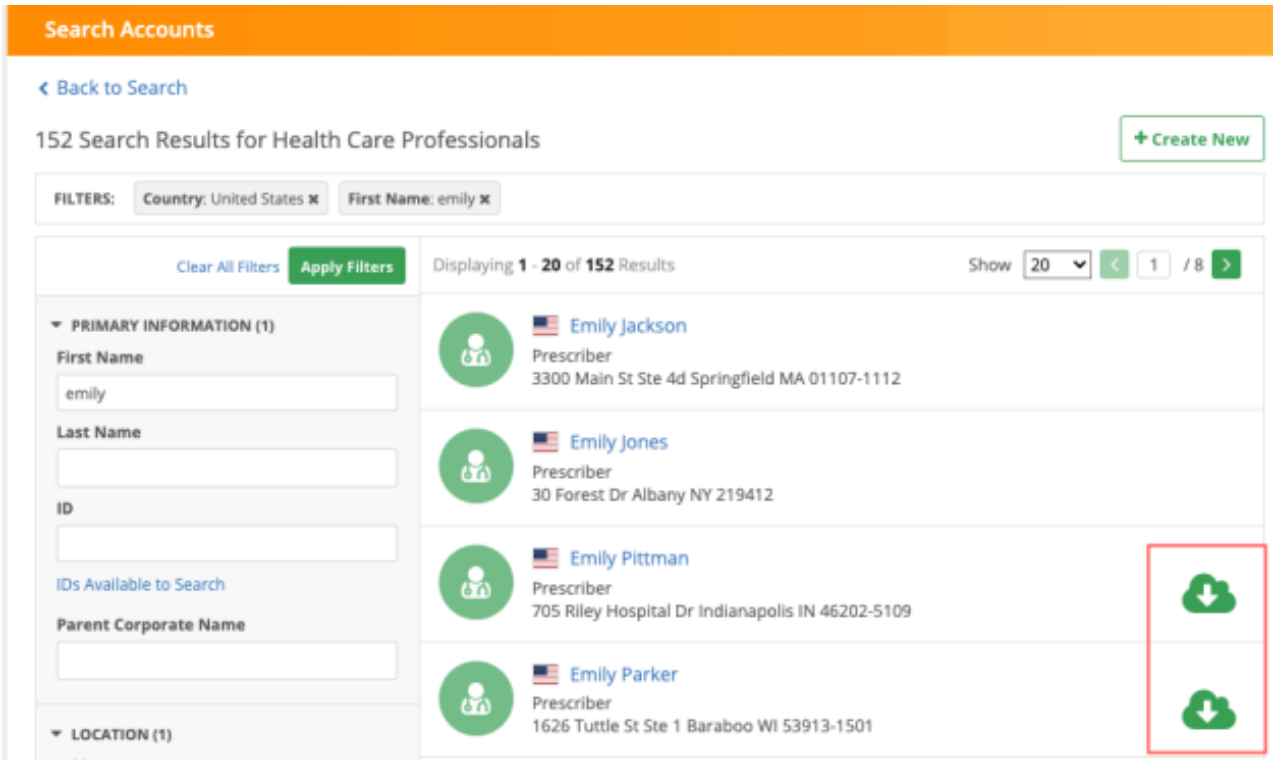
```
hcp.specialty_1__v=PD
```

Profile settings

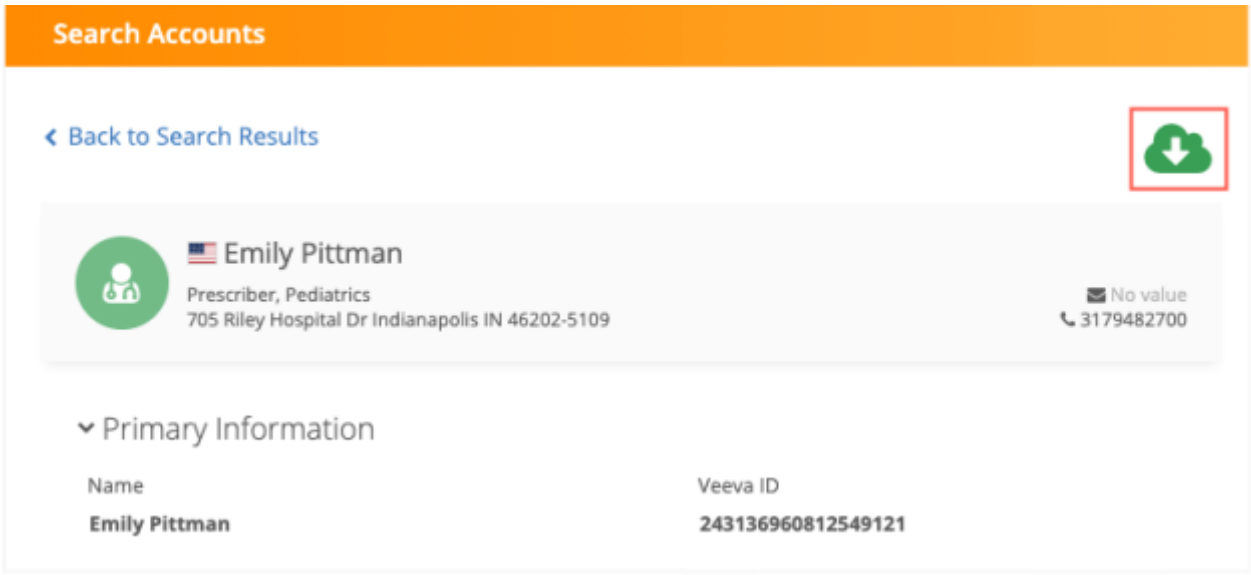
Select the **Display OpenData Download Button** so users can understand which records are not in their Network instance and download those records from Veeva OpenData. By default, the setting is not selected. When the setting is enabled, the **Download** button displays in the search results and on the record profile.

This can be useful when users want to copy records to another system; they will need to first download it to Network.

Search results



Record profile

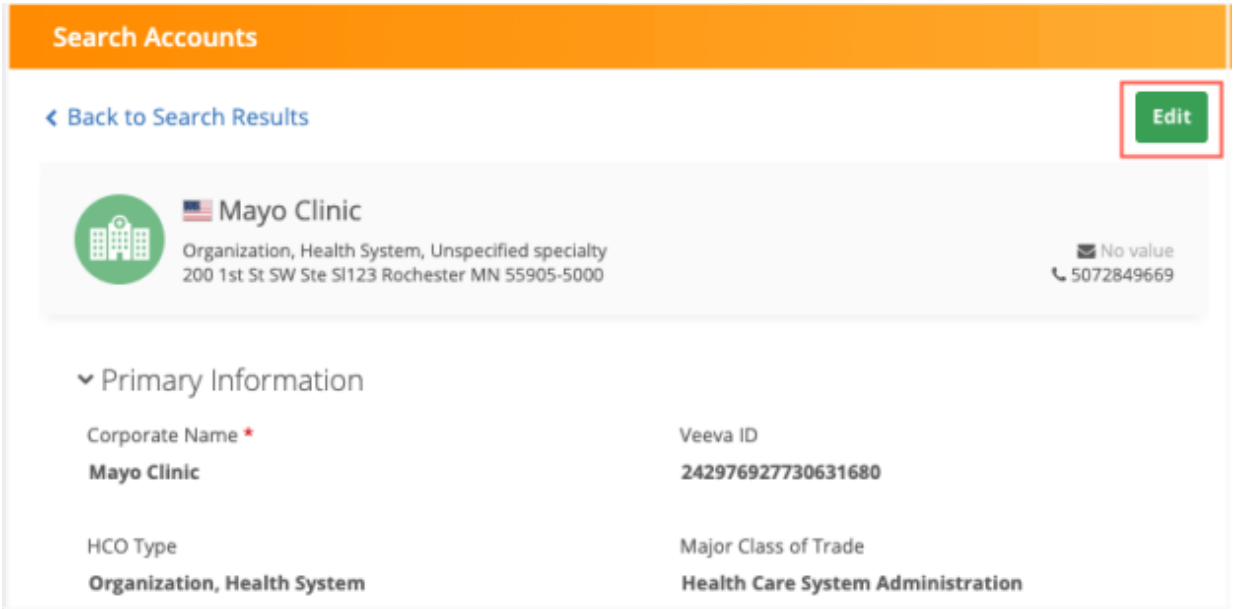


Note: If you do not have permission to download records from OpenData through your data visibility profile, the **Download** button does not display.

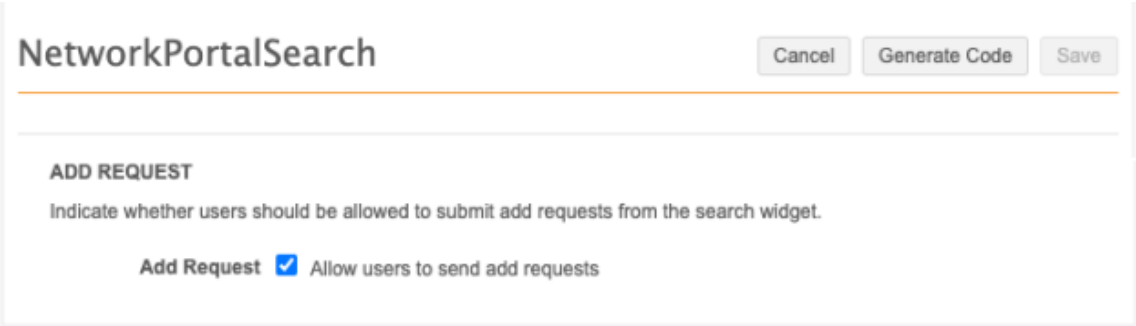
Edit settings

To prevent users from making changes to data in the Network Portal, select the **Hide Edit Button** setting. This is supported for the Search widget in Network Portal applications only.

The **Edit** button displays on profiles for records that are in your Network instance. It does not display on records that have not yet been downloaded from Veeva OpenData.



Tip: To make the Search widget in the Network Portal completely read-only, do not select the **Add Request** setting in the Search widget configuration (**Widgets & Portal > Network Widgets**). This prevents users from submitting add requests through the Search widget.



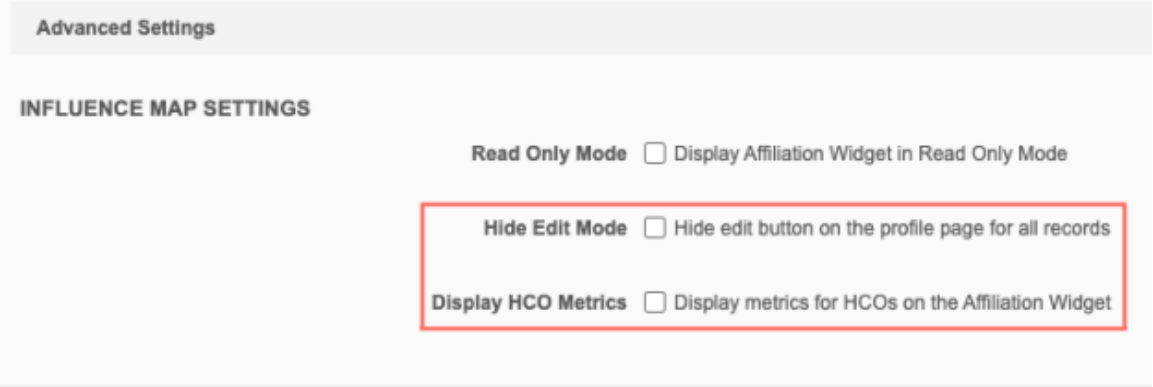
ADVANCED SETTINGS - AFFILIATION WIDGET

21R1.1

The **Advanced Settings** section for Affiliation widgets in Network Portal applications is updated to include specific settings to restrict editing and to display HCO metrics.

New advanced settings

- **Hide Edit Mode** - To prevent users from making changes to data, do not display the **Edit** button on the profile page.
- **Display HCO Metrics** - Display metrics for HCOs. The existing metrics that are used for HCPs can be applied to HCOs.



Enable the settings

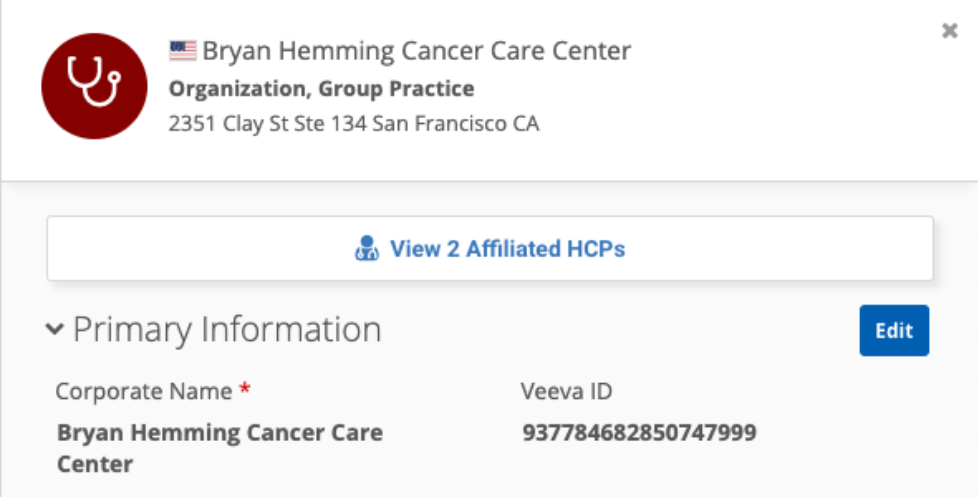
In the Admin console, click **Widgets & Portal > Network Portal**.

1. On the Network Portal page, open an application that contains an Affiliation widget.

   In the **Widget Configuration** section, the defined Affiliation widget contains the **Advanced Settings**.
2. Select the settings that you want to add to customize your application.
3. **Save** your changes.

Hide edit mode

When the **Hide Edit Mode** setting is enabled, the **Edit** button is removed from record profiles that display in the Influence Map. This prevents users from making changes to data.

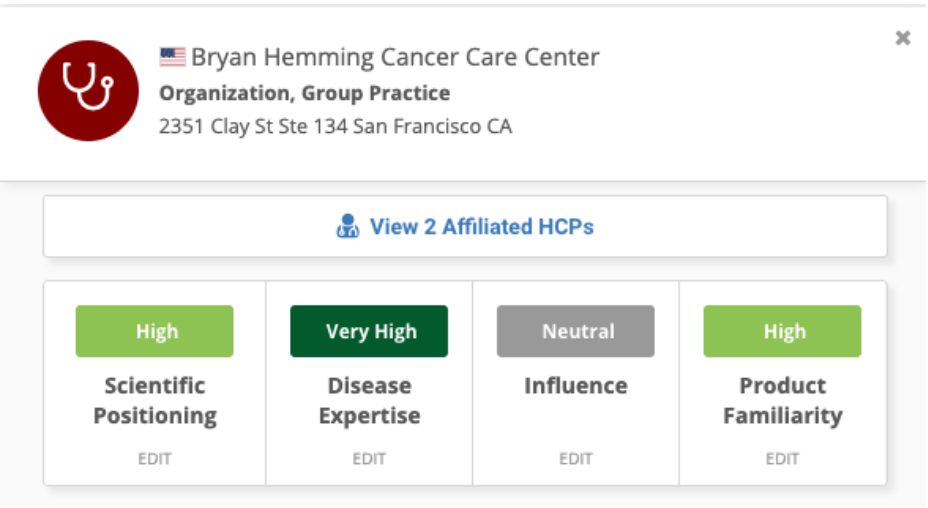


Display HCO Metrics

Enable this setting to add metrics to HCO records on your Influence Map. The existing metrics that you defined for HCPs in your Affiliation widget configuration can be applied to HCOs.

To view metrics on the Influence Map, use the **Filter by Rating** section in the **Tools** menu.

Note: If you have custom branding applied, the HCO icon colors do not update with the filtered metric. Open the HCO profile to view the individual ratings.



Network widgets - General

WIDGET PROFILE LAYOUTS

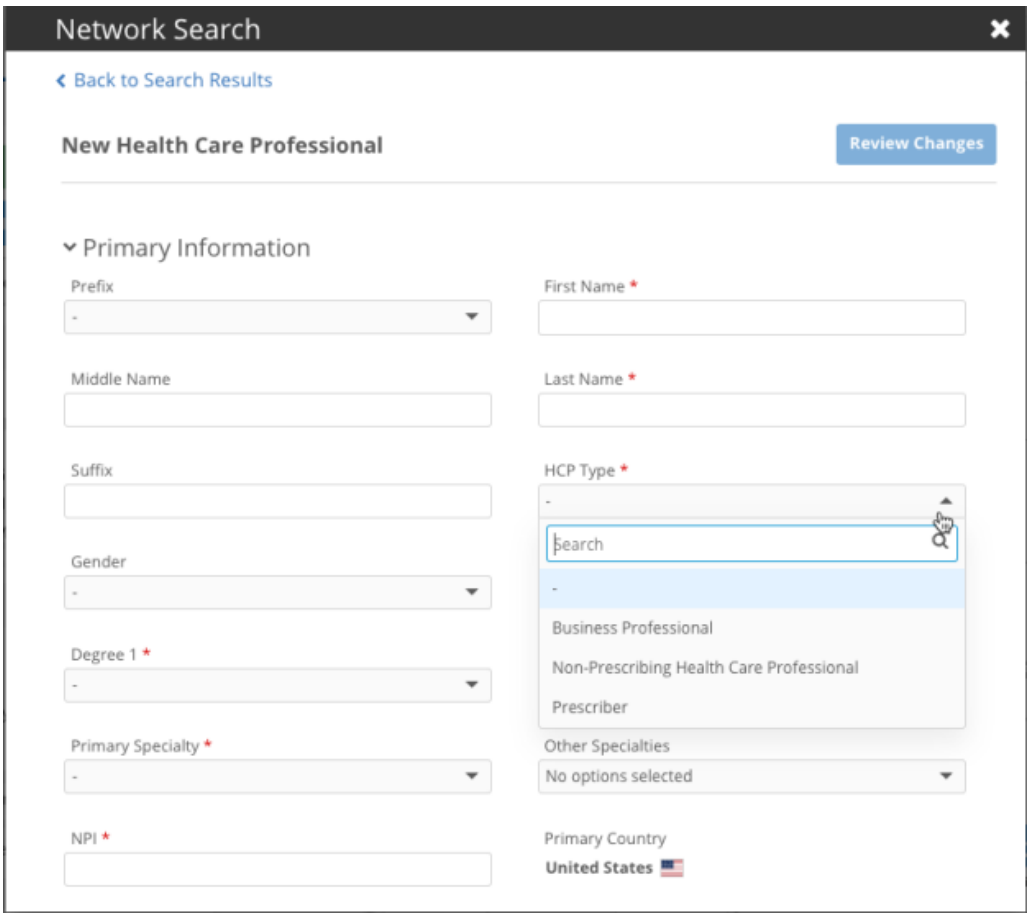
21R2.0

Administrators can configure field and object settings on custom profile layouts to simplify add and change requests submitted through Network widgets.

Add requests are often rejected because the standard request form contains too many fields and too many options for field values. Users also forgot to provide an address on the request. Profile layouts can be simplified to identify required fields and objects and to display only the relevant field values.

Administrators can define settings in profile layouts to do the following:

- **Designate required fields and sub-objects** - Mark specific fields and sub-objects as required. Users will be unable to submit a data change request (DCR) if these are not defined.
- **Populate default field values** - Select a default value for a field. Users can change the value or accept the default.
- **Limit available values** - Simplify field value choices by identifying the specific reference values that will be available.



These enhancements are enabled by default in custom profile layouts. These settings are supported for Network widgets only.

Supported fields and objects

The settings that are available depends on the field and object type.

Field/Object Type	Required Field/Object	Default Value	Limit Items
Text	✓		
Date	✓		
Integer Number	✓		
Reference type	✓	✓	✓
Reference set (example: Specialty set of fields)	✓	✓	✓
Sub-objects (addresses and licenses only)	✓		
Relationship objects (parent HCOs only)	✓		

Fields and objects that are not supported

These settings cannot be defined on the following fields and objects types on profile layouts:

- Fields in the **Profile Header** section of the profile layout.
- System fields
- `primary_country__v` field
- Primary fields
- Custom keys

Designate required fields and sub-objects

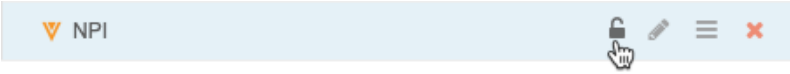
Add requests are often rejected because they don't contain enough information for data stewards to verify and process the request. Also, some downstream systems have required fields that must have a value; for example, HCP Type and Degree.

Administrators can identify fields and objects that must be defined before users can submit add requests and change requests using the Network widgets.

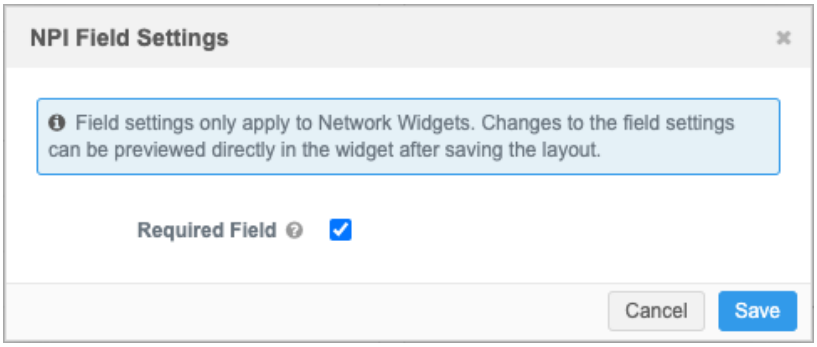
Define required fields

To define a field as required:

1. In the custom profile layout, hover over the field row and click the **Unlock** icon.



2. On the **Field Settings** dialog, click **Required Field.**



3. **Save** your changes. A message in the preview panel confirms that the layout has changed.

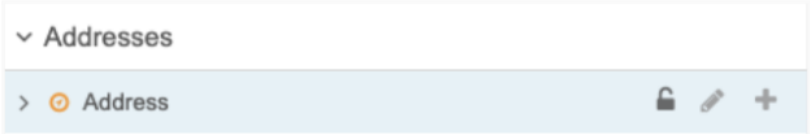
Note: Changes to widget settings can be verified in your Network widget. The preview pane does not display the updates.

On add requests and change requests in the widget, a red asterisk will display beside this field. Users must define a value to submit the request.

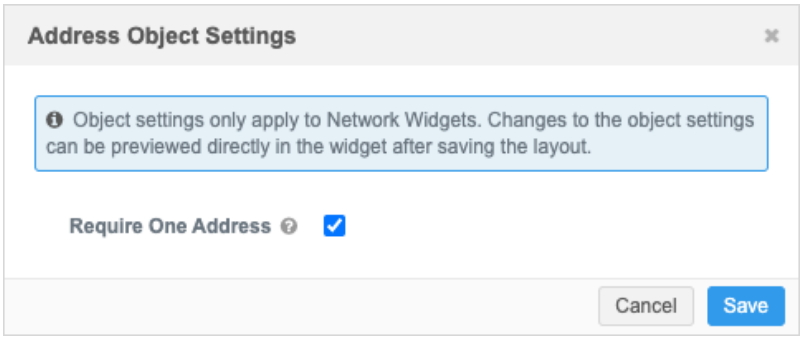
Define required objects

To define an object as required:

1. In the custom profile layout, expand the sub-object or relationship object section and click the **Unlock** icon in the object row.



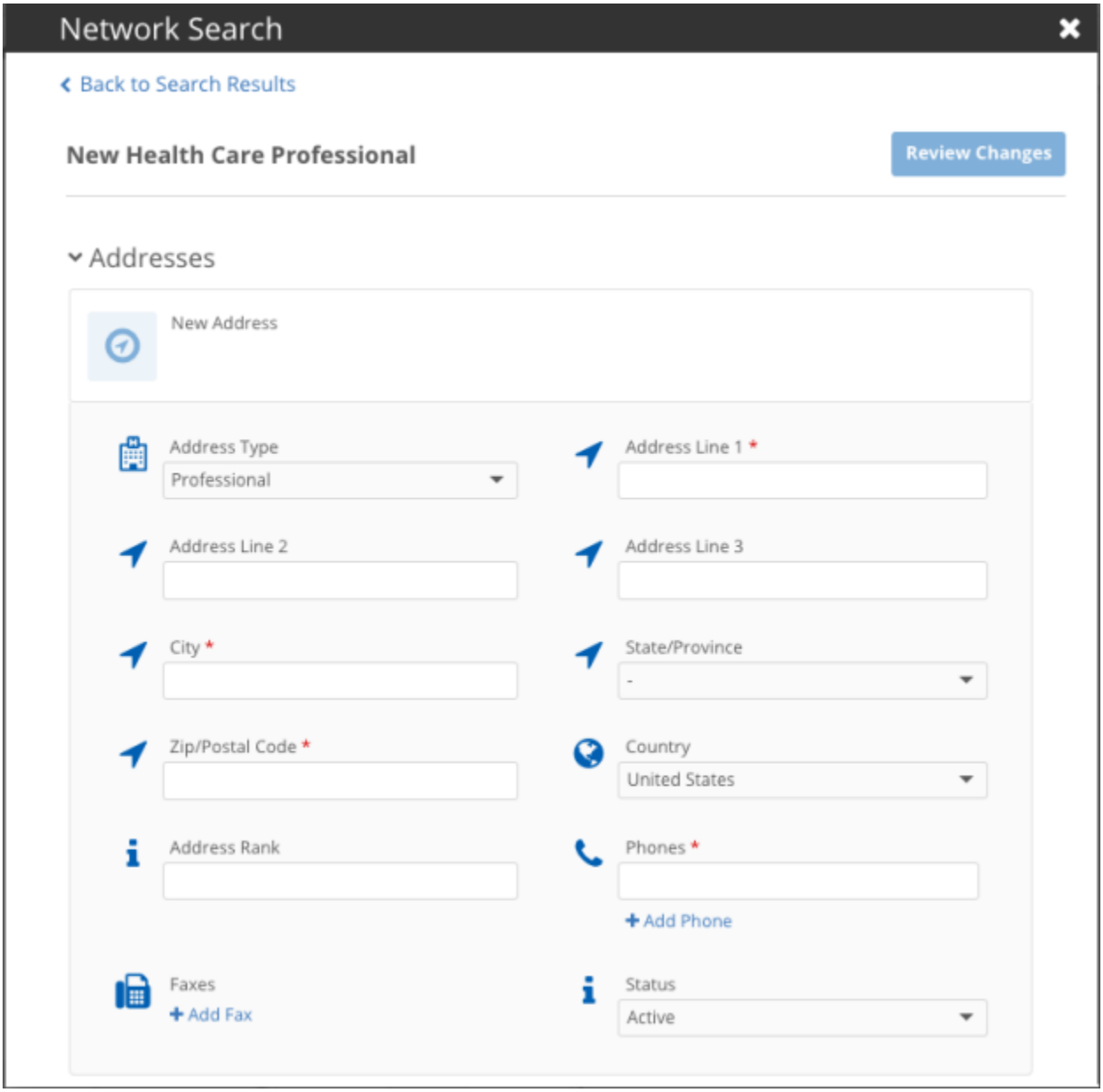
2. On the **Object Settings** dialog, click the checkbox; for example, **Require One Address**.



3. **Save** your changes.

When a sub-object or relationship object is required, the object is expanded on the add or change request form and cannot be removed. At least one object must be defined before users can submit the request.

Note: At least one field on the sub-object or relationship object must be set as a required field so the object can also be set as required.



Populate fields with default values

A default value can be set for reference value fields. These values will override any default values defined by the Network data model. You can also use this setting to set a default value to **No Value** (-) to ensure that users choose the relevant value.

Example

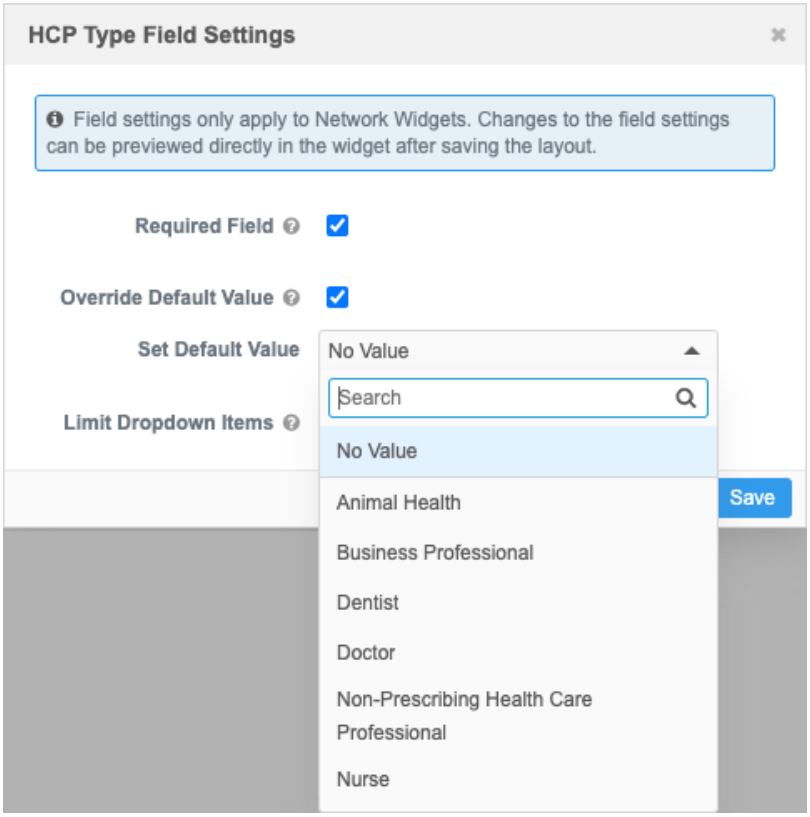
Assigning **No Value** as the default value for the HCP Type field would be useful in the United States. The default value for that field is **Prescriber** but many users forget to change the value to another type such as **Business Professional**. Use this setting to override the default value with **No Value** so users must choose the relevant type.

Add default values to a field

Only reference type fields and reference field sets are supported for this setting.

1. On the profile layout, select the field and click the **Unlock** icon.
2. On the **Field Settings** dialog, select **Override Default Value**.
3. Expand the **Set Default Value** list and set the value that you want to display as the default on add and change requests.

   For example, set **No Value** as the default value if you want users to deliberately choose the value. Alternately, if the widget is used for specialized data, you might choose a specific value like **Animal Health** so users don't have select the value each time they submit a request.



4. **Save** your changes.

The value will be populated for the field in add and change requests forms in the Network widgets.

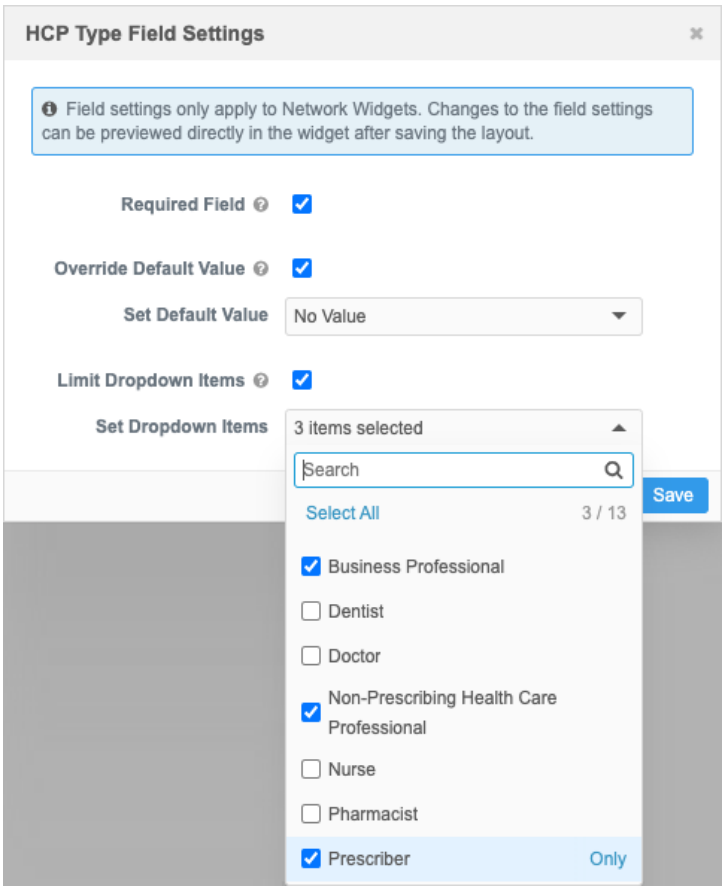
Limit available values

Field lists can contain many values that are not relevant to users; for example, values related to animal health are listed but are not used by most users. To simplify the choice presented to users, you can select specific values to display.

Only reference type fields and reference field sets are supported for this setting.

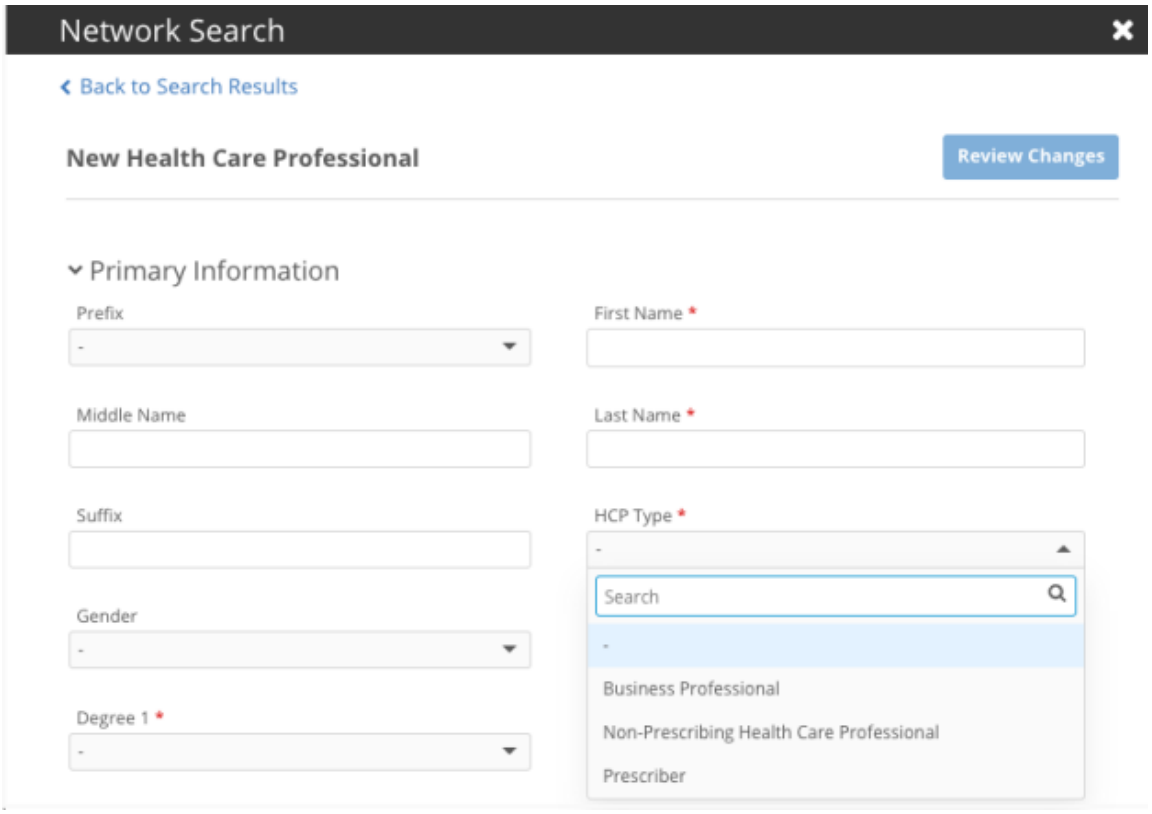
1. On the profile layout, select the field and click the **Unlock** icon.
2. On the **Field Settings** dialog, select **Limit Dropdown Items**.
3. Expand the **Set Dropdown Items** list and set the values that you want to display in the list on add and change requests.

   For example, to make the choice easier for users, you might limit the list to three values.



4. **Save** your changes.

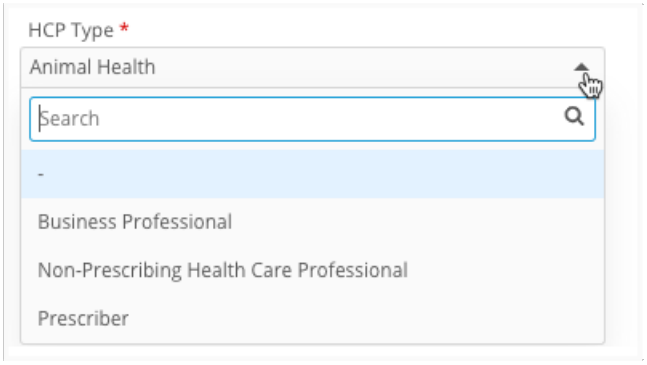
The field list will only display the values that you selected for add and change requests in the Network widgets.



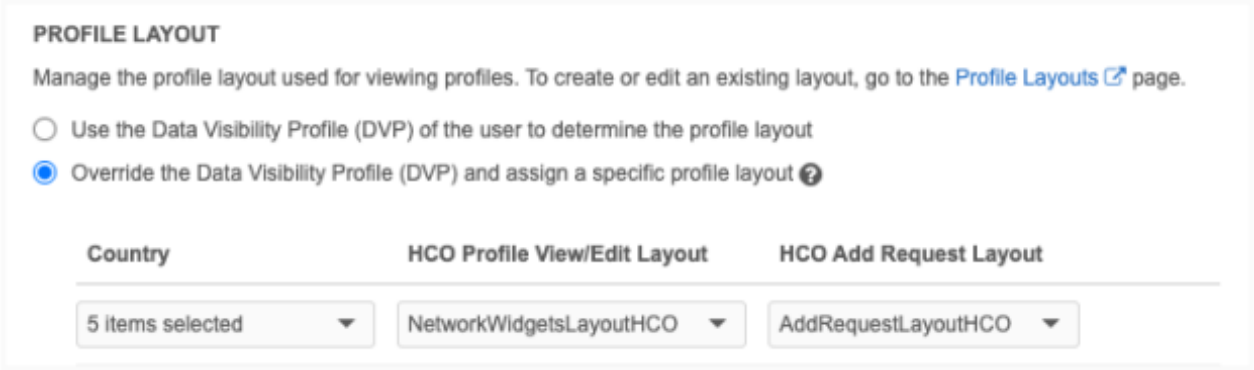
Change request considerations

If field and object settings have been added to a profile layout and a user edits an entity in the widget, the settings will be applied. For example, if there is no parent HCO defined on the record and it's now required, users cannot submit the change request without adding one.

Fields that are now marked as required must also be completed before users can submit the change request. If the field values have been limited and the current value is different, the current value remains in the list as an option. For example, if the current value for HCP Type is Animal Health, but the profile layout is updated to only include four values for that field and Animal Health is not one of those values, it will still be an option in the list.

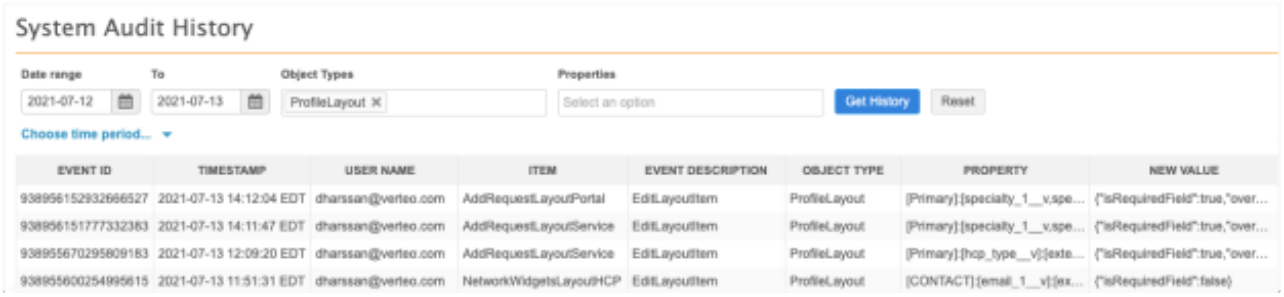


Tip: If you don't want the field and object settings to apply to change requests, use the **Profile Layout** section in the search widget configuration to assign different layouts for change requests and add requests. For example, the records are already created so required fields are not necessary.



Logs

Changes to the profile layout are logged in the **System Audit History** (**Logs**).



Tip: Use the **Object Types** list to filter the table by ProfileLayout to find the changes.

Configuration management

The profile layout settings can be exported to target environments using configuration packages. For example, if you created and tested the settings in your Sandbox environment, the settings will be included by default when you export the profile layout to your Production environment.

PROFILE LAYOUTS - PRIMARY COUNTRY

21R1.1

The primary country field is added to the predefined **NetworkWidgetsLayoutHCO** and **NetworkWidgetsLayoutHCP** profile layouts. The field is added to the **Primary** section of the layout. Adding this field ensures that there is a country associated with data change requests that are submitted through the widgets.

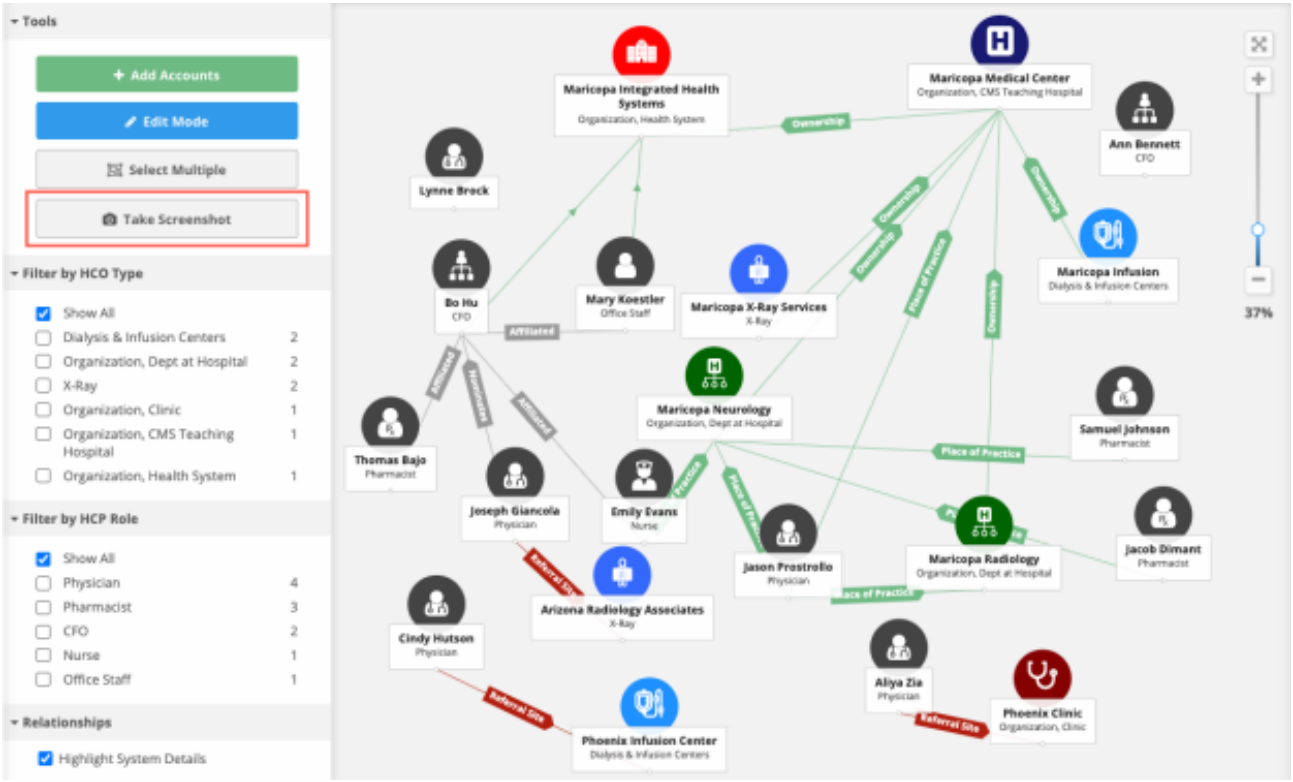
This enhancement is added by default in new Network instances and in existing Network instances.

Affiliation widget

INFLUENCE MAP SCREENSHOTS

21R2

Widget users can now take a screenshot of the Influence Map canvas using the new **Take Screenshot** tool. Previously, it was difficult to take a high quality screenshot of the entire map. Using this tool, it's easy to snap an image to display in a presentation or to share with others.



This enhancement is enabled by default in your Affiliation widget.

Take a screenshot

The **Take Screenshot** tool is available for all views and for all users that have edit and read-only access.

To take a screenshot of the Influence Map canvas:

- In the **Tools** menu, click **Take Screenshot**.

The image will be downloaded to your local computer as a .png file with the following naming convention: `<health_system> - <view_name>.png`.

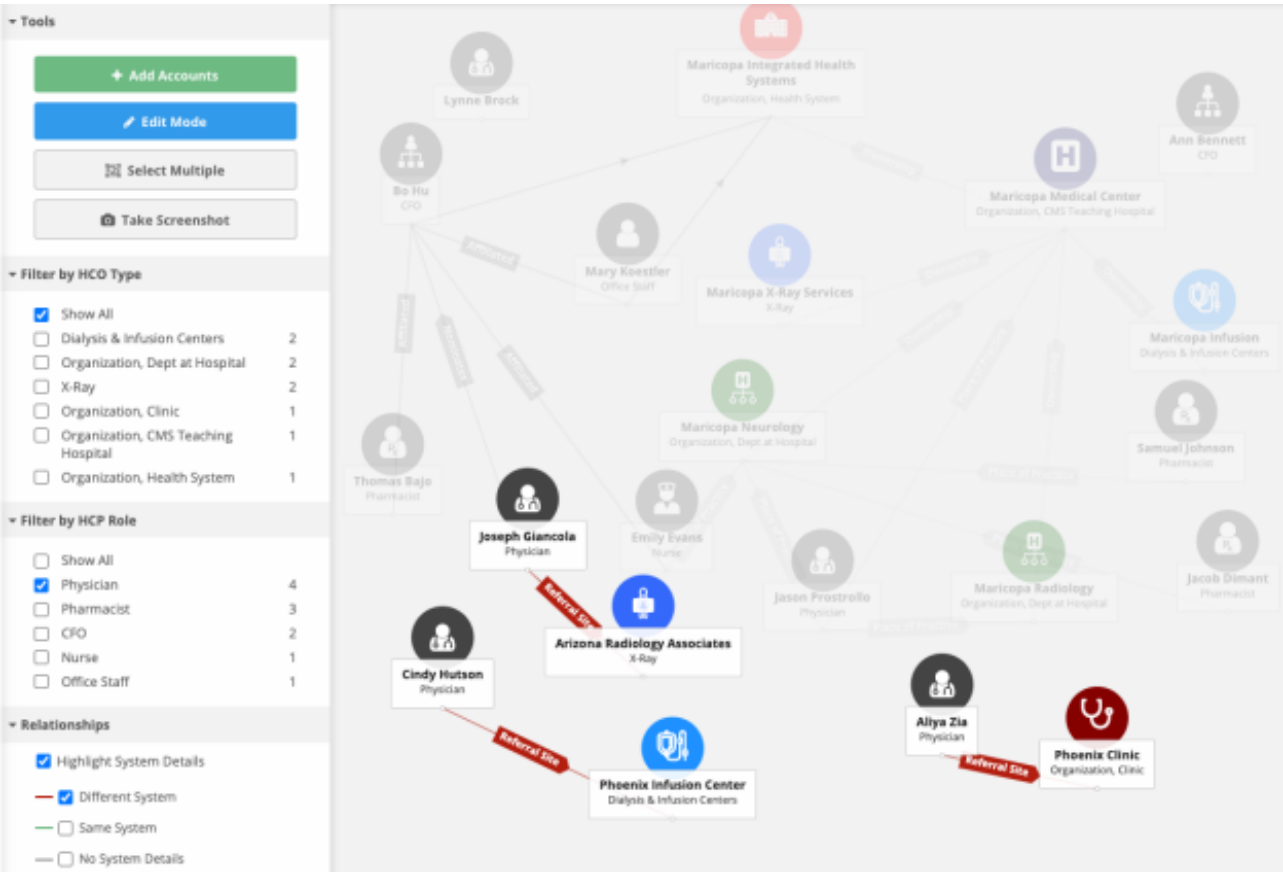
The entire Influence Map will be included in the screenshot even if you are zoomed in and some of the entities appear to be offscreen.

Filtered views

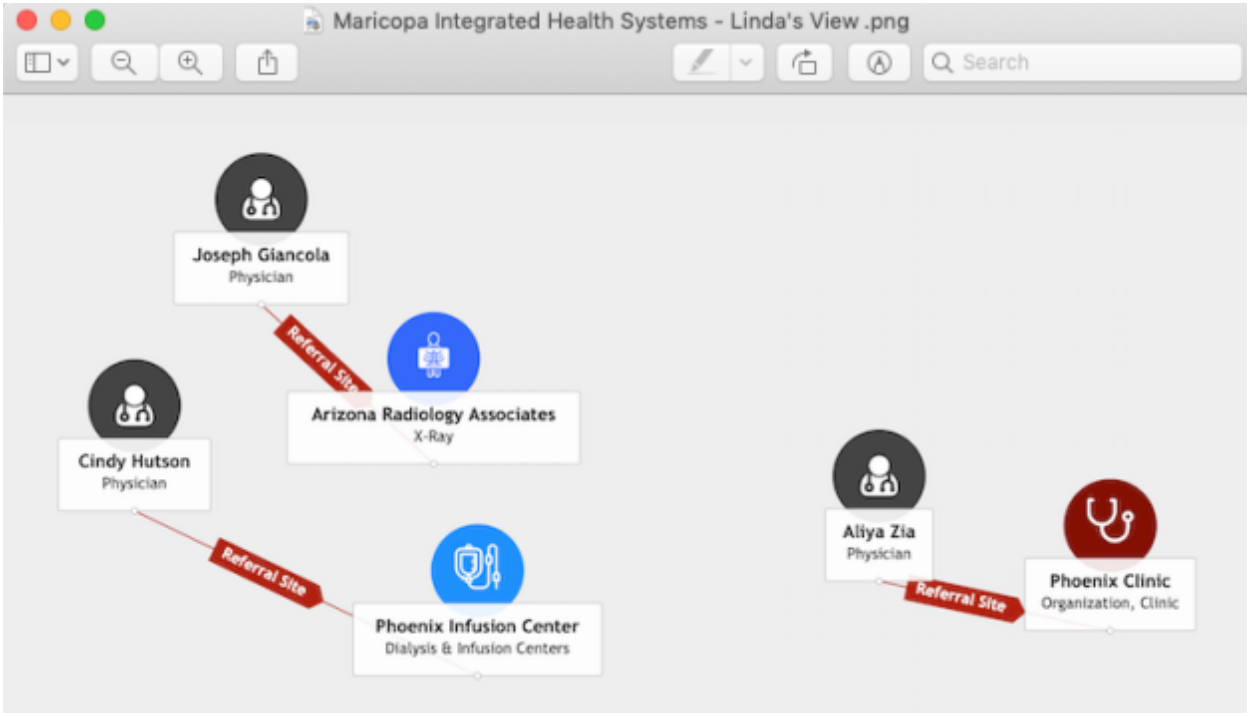
If you filter the view for specific HCPs, HCOs, or relationships, only the highlighted entities and relationships will be included in the screenshot.

Example 1

To highlight referrals that are going outside of the health system, filter the canvas to view physicians and all HCOs in a different system. All the other entities and relationships are dimmed.



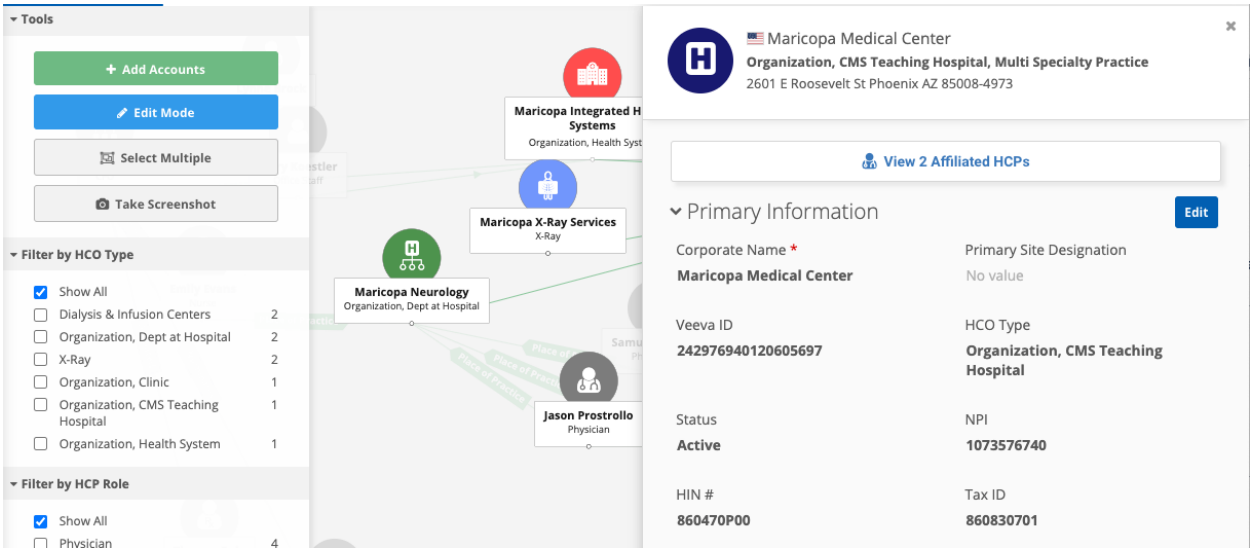
When you take a screenshot of the view, only those highlighted physicians and HCOs in the same system are included in the .png file.



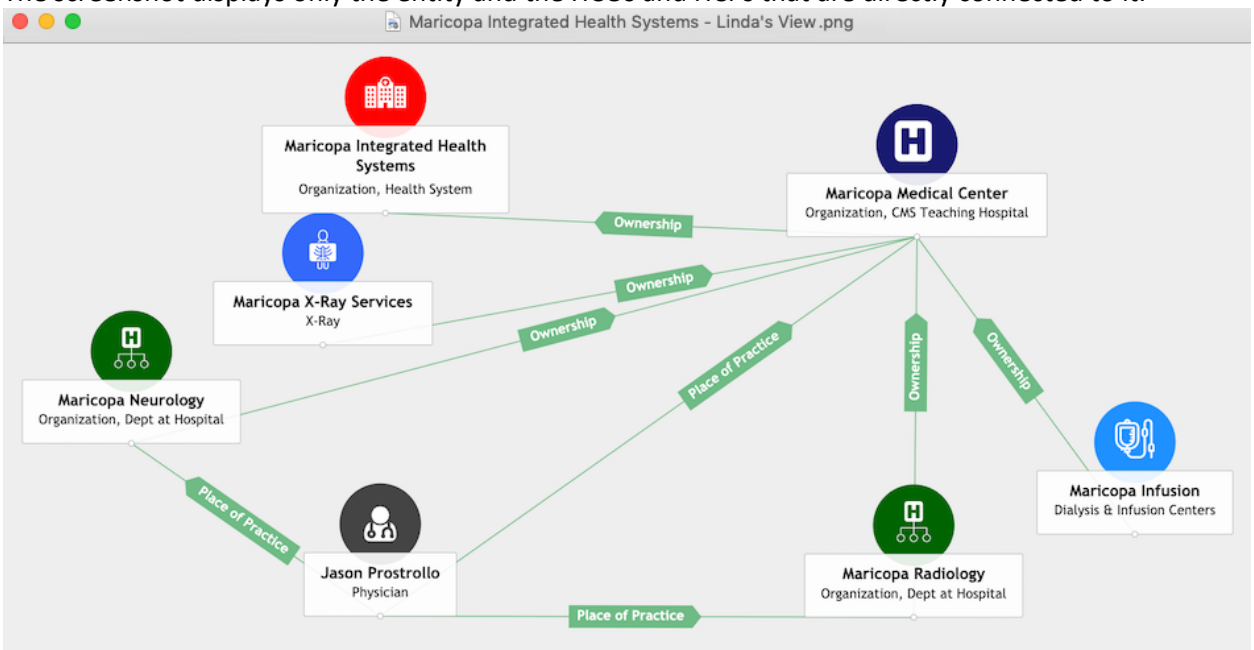
Focused entity

If you want to screenshot a particular entity and its connection, click the entity. The entity and its connections are highlighted on the Influence Map and the profile preview opens.

Click **Take Screenshot**.



The screenshot displays only the entity and the HCOs and HCPs that are directly connected to it.



REPORTING ON AFFILIATION WIDGET DATA

21R2

Advanced reporting users can report on the Affiliation widget data in their Network instance. Use the reports to summarize the data in your views. The reports can be downloaded and shared with other users or sent to your downstream systems.

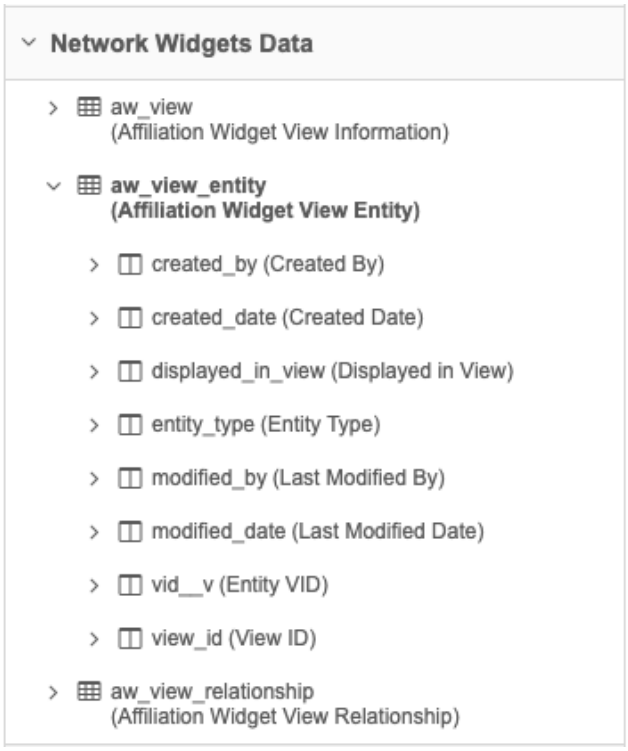
The reporting tables are available if the Affiliation widget is enabled in your Network instance.

Widget reporting tables

New tables are available in the reporting tree view in the SQL Query Editor.

Expand the **Network Widgets Data** section to view and use these tables:

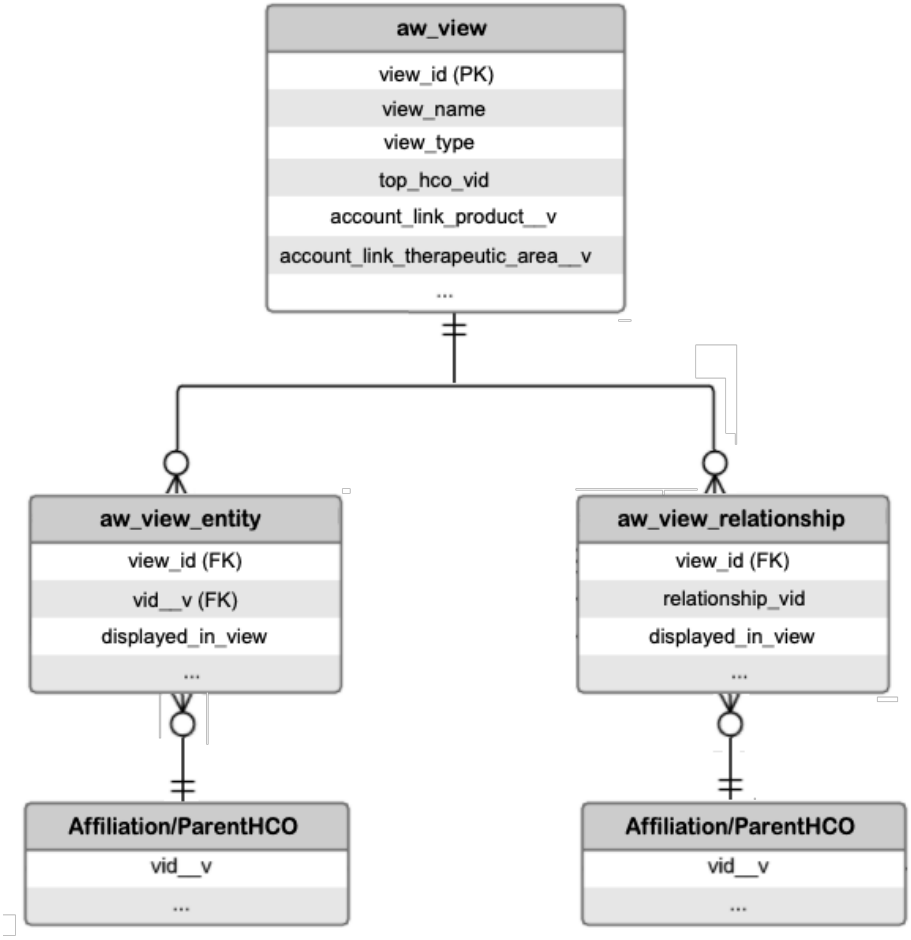
- **aw_view** - List of all the views created for the Affiliation widget in your Network instance.
- **aw_view_entity** - List of entities that have existed in a view.
- **aw_view_relationship** - List of relationships that have existed in a view.



The reporting tables are updated every five minutes.

Affiliation widget reporting schema

The tables help you investigate the data in your Affiliation widget views. Use the tables to help build your SQL query.



Affiliation Widget View Information (aw_view)

This table contains the list of views created for the affiliation widget.

Field	Label	Description
view_id	View ID	Unique ID for the view.
view_name	View Name	The name of the view.
view_type	View Type	Type of view (Default, Standard, or Custom)
product	Product	The product associated with the view.
therapeutic_area	Therapeutic Area	The therapeutic area associated with the view.
top_hco_vid	Top HCO VID	Top parent Veeva ID associated with the view. Typically, the health system VID.
view_status	View Status	Status of the view.

Field	Label	Description
created_date	Created Date	Created date of the view. For views created before this release, the migration date for the release update is used.
modified_date	Last Modified Date	Last modified date of the view. For views created before this release, the migration date for the release update is used.
created_by	Created By	User who created the view. For Default and Standard views, the user is System. If the view was created before the report was available, this might be empty.
modified by	Last Modified By	User who modified the view. For standard and default views, the user is System. Exception: When default views are removed, the user that removed the view displays. If the view was created before the report was available, this might be empty.

Affiliation Widget View Entity (aw_view_entity)

This table contains the list of entities that have existed in a view.

Field	Label	Description
view_id	View ID	Unique ID for the view.
vid__v	Entity ID	Unique Veeva ID for the entity.
entity_type	Entity Type	Entity type.
displayed_in_view	Displayed in View?	Indicates whether the entity is currently displayed in the view.
created_date	Created Date	Created date of the entity in the view.
modified_date	Last Modified Date	Last modified date of the entity in the view.
created_by	Created By	User who added the entity to the view. The user is System whenever HCPs are added to the default view when load_to_default_view = Y.
modified by	Last Modified By	User who last added or removed the entity from the view. The user is System whenever invalid entities are removed, merges, and other system processes occur to cleanse the data.

Affiliation Widget View Relationship (aw_view_relationship)

This table contains the list of relationships that have existed in a view.

Field	Label	Description
view_id	View ID	Unique view ID for the Affiliation widget.
relationship_vid	Relationship VID	Unique Veeva ID for the ParentHCO and Affiliation relationships.
relationship_type	Relationship Type	Type of relationship (ParenHCO or Affiliation).
displayed_in_view	Displayed in View?	Indicates whether the relationship is currently displayed in the view.
created_date	Created Date	Created date of the relationship in the view.
modified_date	Last Modified Date	Last modified date of the relationship in the view.
created_by	Created By	User who created the relationship in the view. The user is System whenever relationships are added based on the widget configuration.
modified by	Last Modified By	User who last added or removed the relationship from the view. The user is System whenever invalid relationships are removed, merges, and other system processes occur to cleanse the data.

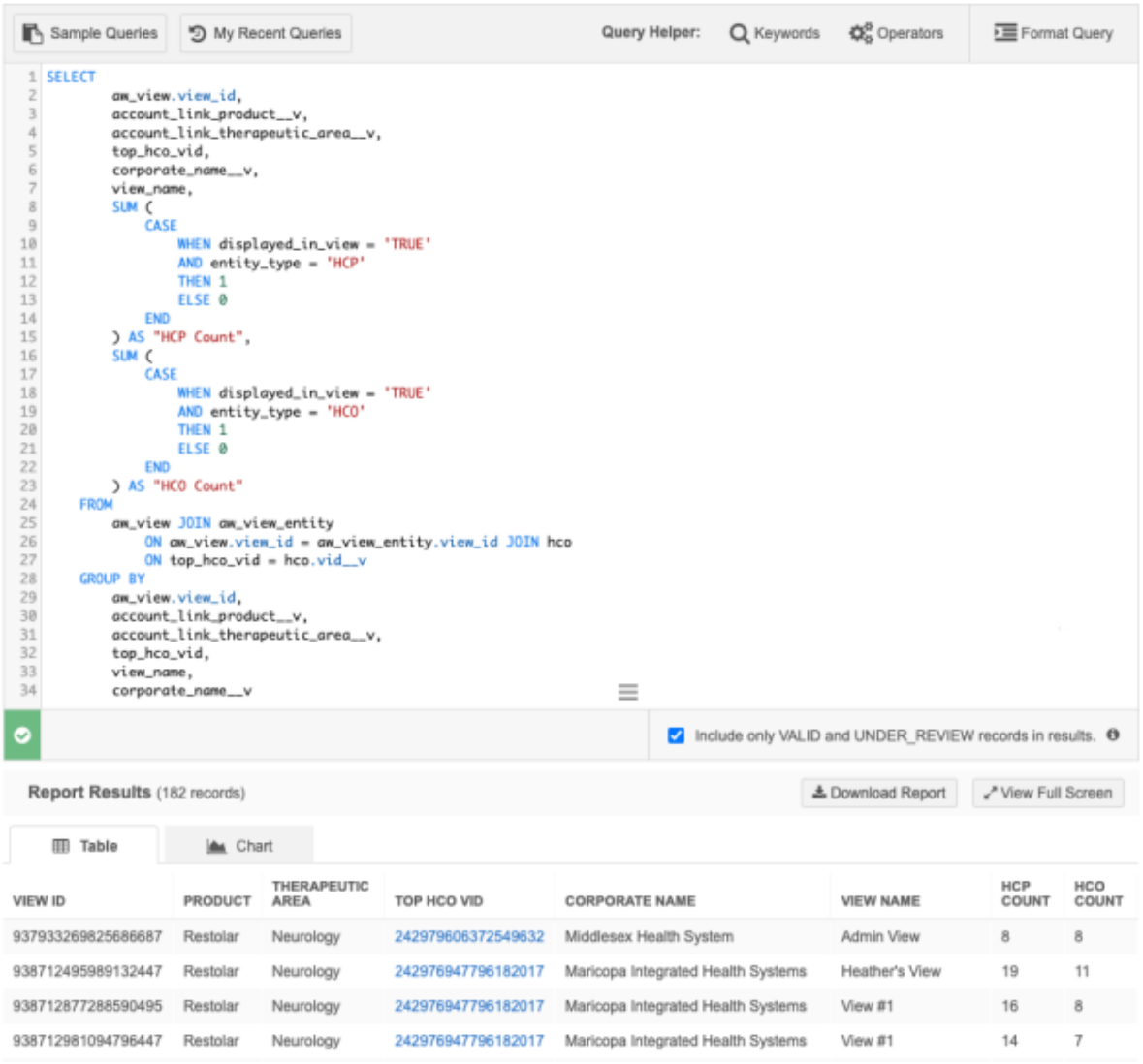
Sample query

A query called **Aggregated Summary of Affiliation Widget Views** is provided to help summarize the Affiliation widget data. The query is available by default if the Affiliation widget is enabled in your Network instance.

To use the query:

1. In the SQL Query Editor, click **Sample Queries**.
2. Scroll to the **Network Widgets** section, or type a search term (for example, *widget*) in the search bar to quickly find it.
3. Select the query and click **Insert Selected Query**.
4. Click **Run Query**.

The **Report Results** section displays the data for all of the Affiliation widgets enabled in your Network instance.



You can download the report to analyze the data or to share it.

Query examples

Example 1

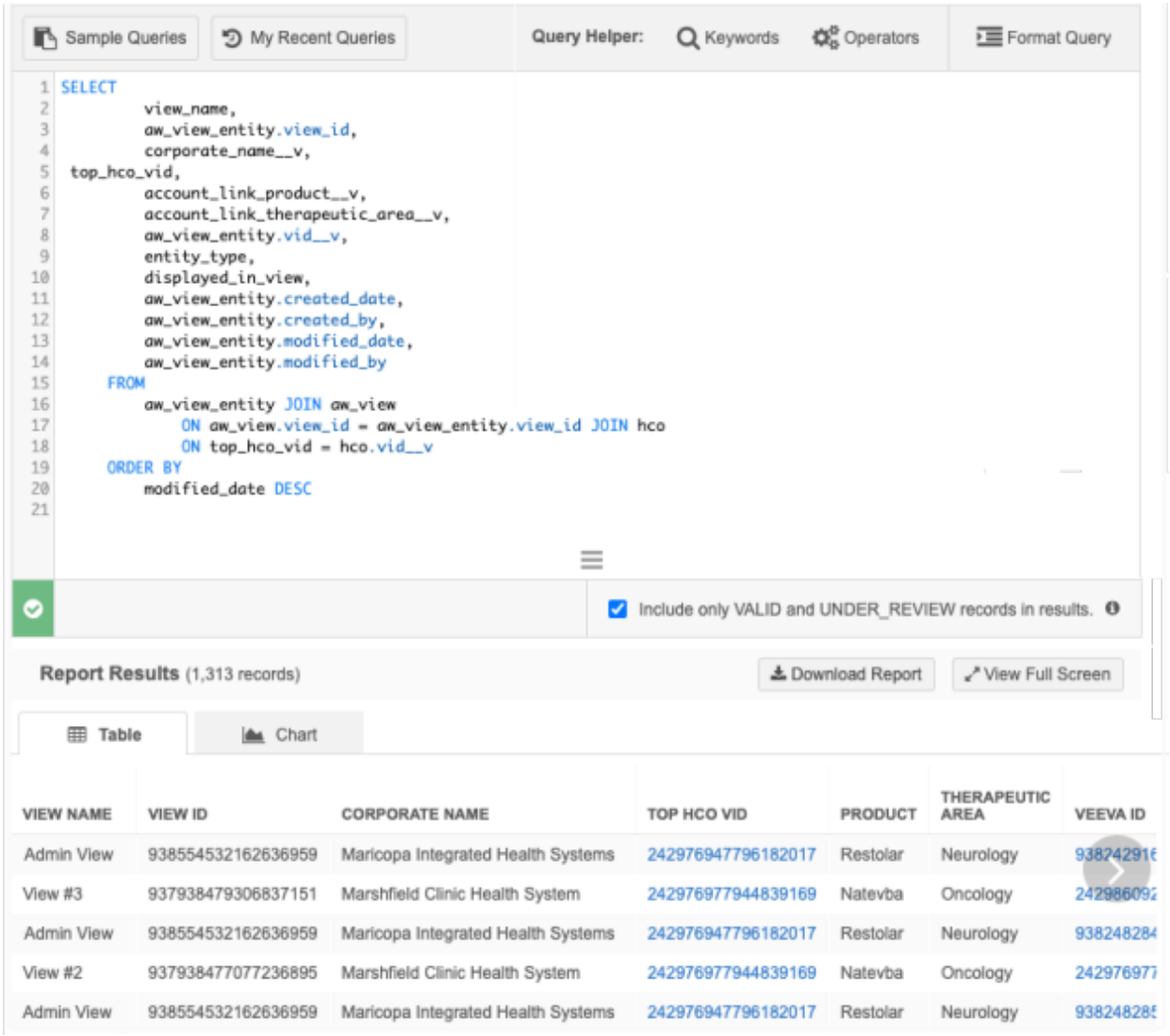
Run this query to report on the entities in your views. The query joins the `aw_view` table and `aw_view_entity` table.

```
SELECT
          view_name,
          aw_view_entity.view_id,
          corporate_name__v,
  top_hco_vid,
          account_link_product__v,
          account_link_therapeutic_area__v,
          aw_view_entity.vid__v,
```

```
        entity_type,
        displayed_in_view,
        aw_view_entity.created_date,
        aw_view_entity.created_by,
        aw_view_entity.modified_date,
        aw_view_entity.modified_by
    FROM
        aw_view_entity JOIN aw_view
            ON aw_view.view_id = aw_view_entity.view_id JOIN hco
            ON top_hco_vid = hco.vid__v
    ORDER BY
        modified_date DESC
```

Results

The results will display details for the therapeutic area and product, the health system name, and so on.



Example 2

Use this query to extract all the data in the Affiliation widget.

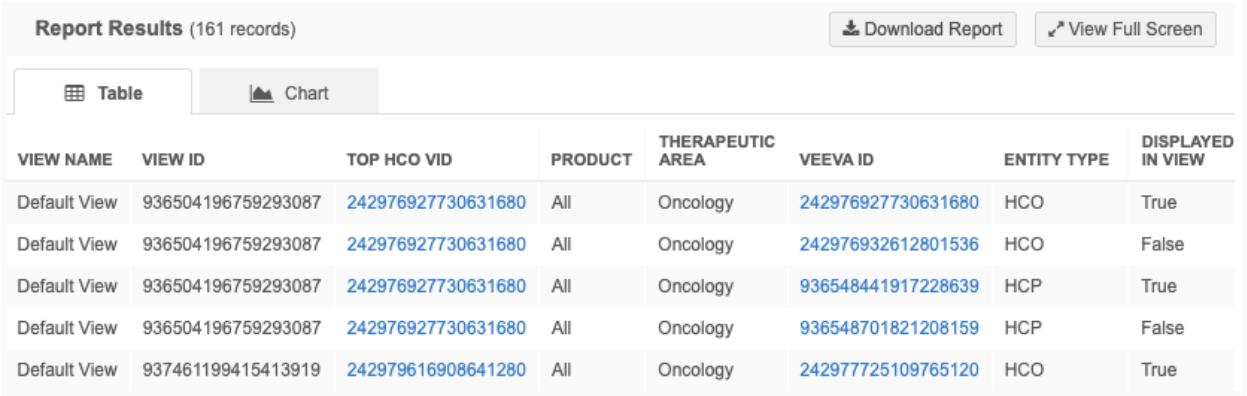
```
SELECT
         view_name,
         aw_view_entity.view_id,
         top_hco_vid,
         account_link_product__v,
         account_link_therapeutic_area__v,
         vid__v,
         entity_type,
         displayed_in_view
     FROM
         aw_view_entity JOIN aw_view
             ON aw_view.view_id = aw_view_entity.view_id

 union

 SELECT
         view_name,
         aw_view_relationship.view_id,
         top_hco_vid,
         account_link_product__v,
         account_link_therapeutic_area__v,
         relationship_vid,
         relationship_type,
         displayed_in_view
     FROM
         aw_view_relationship JOIN aw_view
             ON aw_view.view_id = aw_view_relationship.view_id
```

Results

The results will display details for the view, therapeutic area and product, and the health system.



Report Results (161 records) Download Report View Full Screen

Table Chart

VIEW NAME	VIEW ID	TOP HCO VID	PRODUCT	THERAPEUTIC AREA	VEEVA ID	ENTITY TYPE	DISPLAYED IN VIEW
Default View	936504196759293087	242976927730631680	All	Oncology	242976927730631680	HCO	True
Default View	936504196759293087	242976927730631680	All	Oncology	242976932612801536	HCO	False
Default View	936504196759293087	242976927730631680	All	Oncology	936548441917228639	HCP	True
Default View	936504196759293087	242976927730631680	All	Oncology	936548701821208159	HCP	False
Default View	937461199415413919	242979616908641280	All	Oncology	242977725109765120	HCO	True

Saved reports

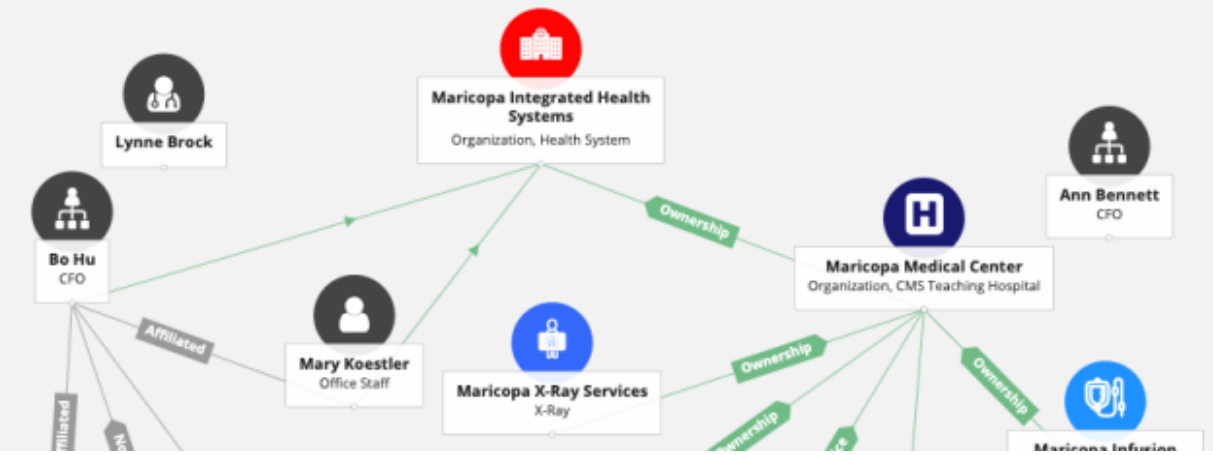
You can save a report query so you can schedule the report or run it manually and export the results to your FTP folder.

For more details, see Saved report options in the *Veeva Network Online Help*.

FONT SIZE

21R2

The text and nodes on the Influence Map have been increased to improve readability. The node size and font for HCOs and HCPs has been increased so they are the same size as health systems on the Influence Map. The font size for relationship labels has also increased so they are easier to read on large maps.



These enhancements are enabled by default in your Affiliation widget.

BULK EDITING

21R1.1

You can now select multiple HCP and HCO accounts to manage at the same time. Influence maps can contain hundreds of accounts. Previously, each account had to be moved, removed, or added to views individually. Now, you can select multiple accounts to quickly manage; for example, you can copy multiple accounts from one view to another custom view.

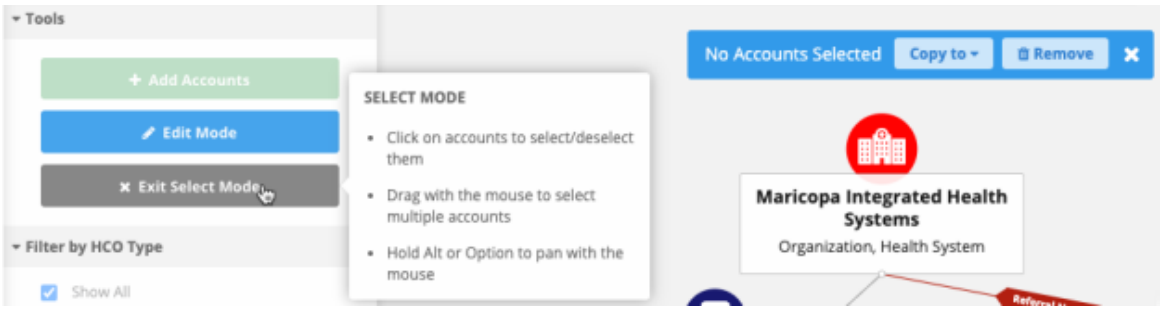
This enhancement is enabled by default in the Affiliation widget.

Select multiple accounts

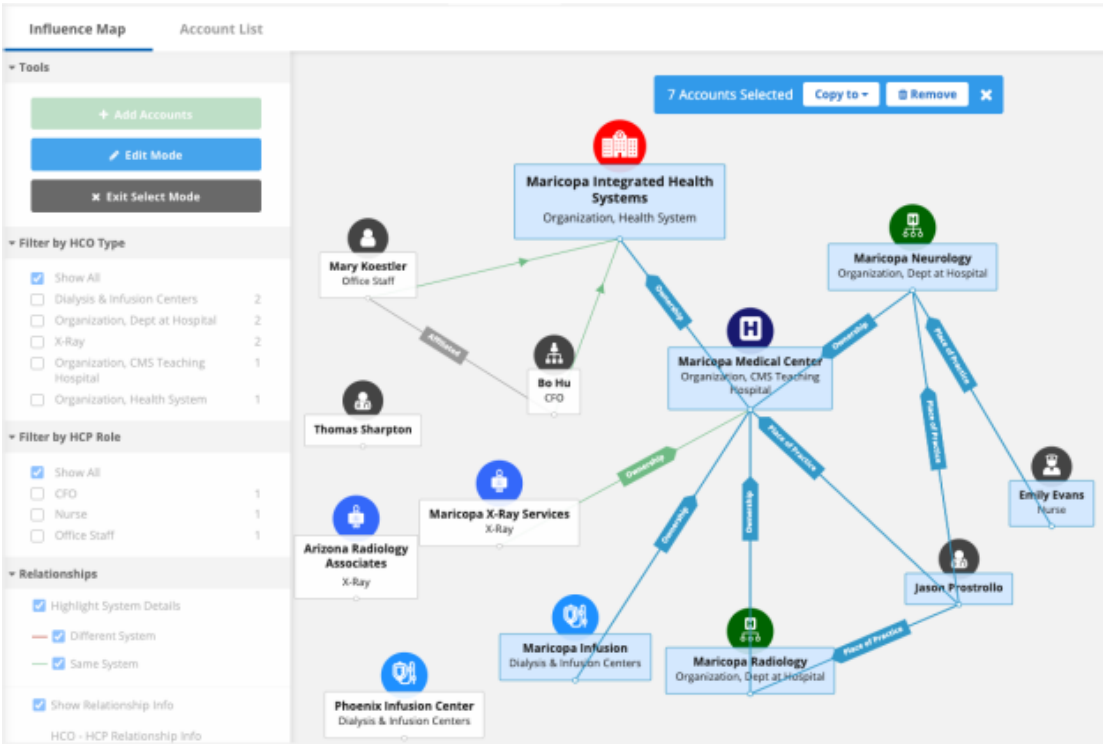
To select accounts in bulk:

1. On the **Tools** menu, click **Select Multiple**. Your mouse cursor will become a crosshair **+** symbol and an action bar will display at the top of the map.

   A tooltip displays when you hover over **Select Multiple** to explain how to select and deselect accounts and how to pan the view. The other actions on the **Tools** menu are dimmed and cannot be used when **Select Mode** is activated. You can choose **Edit Mode** but that will deactivate **Select Mode**.

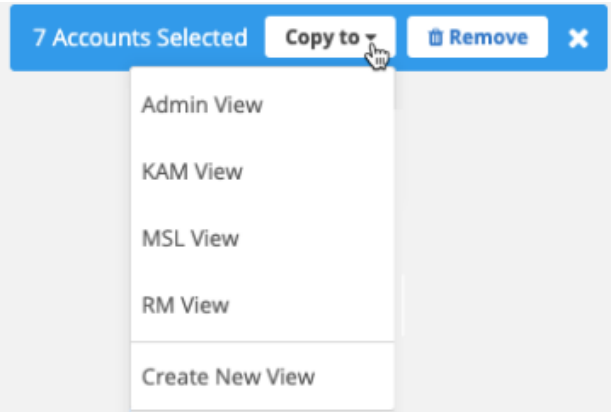


2. Click the map and drag a rectangle to select multiple accounts. The accounts become highlighted. While the accounts are highlighted, you can click other accounts to add them to the selection.



To deselect one account when multiple accounts are highlighted, click the account. To deselect all accounts, click an empty area on the view.

3. At the top of the map, the action bar updates to display a count of the selected accounts. For example, **7 Accounts Selected**. The count updates if you select more accounts or remove a selected account.



The following actions are available for the selected accounts:

- **Copy to** - Expand the list to copy the accounts to another view. Copy to an existing view or create a new view. The existing views that are available for this product and therapeutic area are listed.

  Note: Relationships are also copied to new or existing views if both accounts are copied; the connecting line between the accounts is maintained.

  Copy the accounts to an existing view

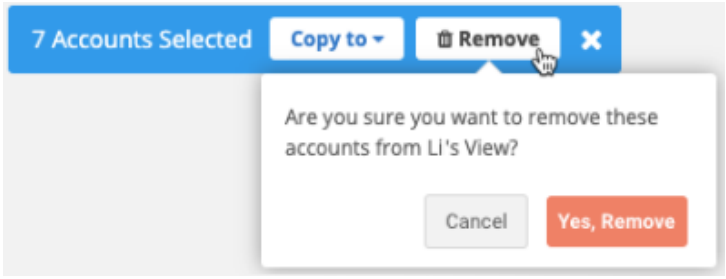
  Choose one of the views in the list. The accounts will be copied and the view will open with the selected accounts highlighted. The accounts are added to the bottom of the view but will maintain their relative position; you can reposition them while they are still highlighted.

  If an account already exists in the view, it will not be copied; the existing account position is maintained.

  Create a new view

  Click **Create New View**. A new view will be added and it will open with the selected accounts copied and highlighted. The health system is not automatically added to the new view. The view will be given a default name; for example, View #1.

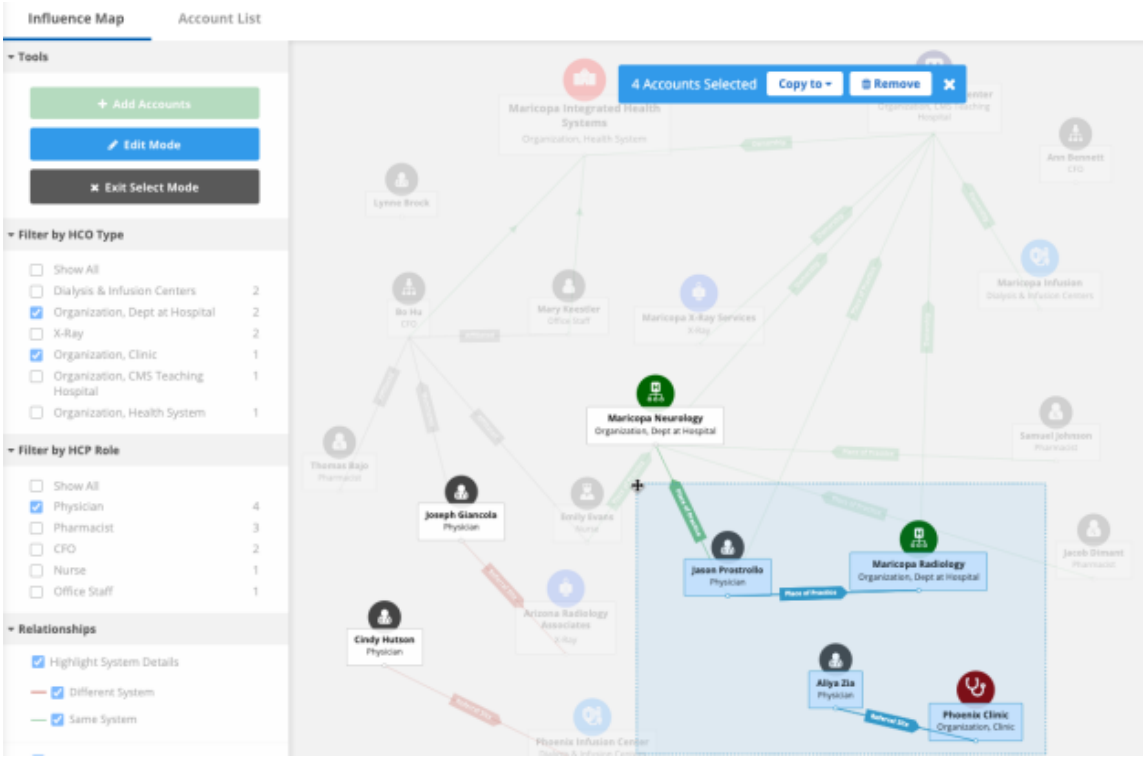
- **Remove** - Delete the accounts from the view. In the confirmation pop-up, click **Yes, Remove**. The accounts are deleted from the view.



4. You can also select multiple accounts to reposition them on the existing view. To reposition the accounts, hover over a highlighted account and your mouse cursor will become a hand. Click and drag the accounts to another place on the view.
5. When you are finished, click **Exit Select Mode** to activate the other options on the **Tools** menu again.

Filtered view

If the view is filtered to highlight specific HCPs or HCOs, only those accounts are available for selection. When you draw the area to select accounts, the dimmed accounts are not included. This is helpful for copying or removing specific accounts.



DISPLAY RELATIONSHIP INFO

21R1.1

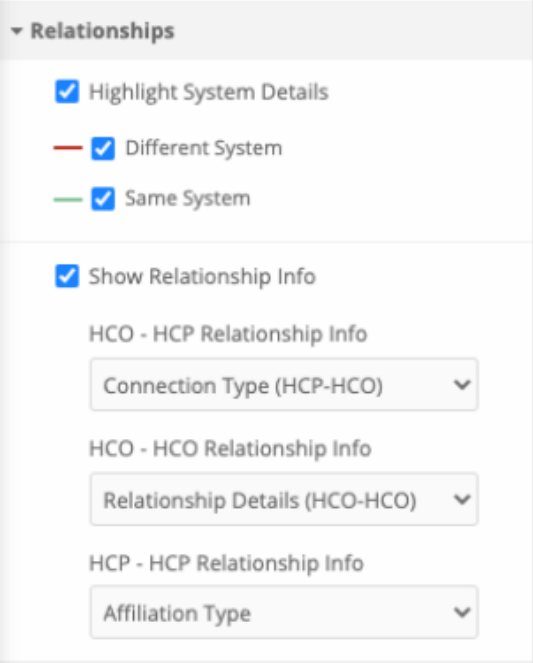
You can now choose how to display relationship information on the Influence Map. Relationships labels can be useful for understanding how objects are related, but for some users, the connecting lines are sufficient. Using the **Tools** menu, you can decide how the information is presented.

This enhancement is enabled by default for your Affiliation widget.

Viewing relationship labels

The **Tools** menu includes a **Relationships** section. The **Show Relationship Info** setting is enabled by default.

Note: If all relationships (HCP-HCO, HCP-HCP, HCO-HCO) have only one label each, only the **Show Relationship Info** setting displays.



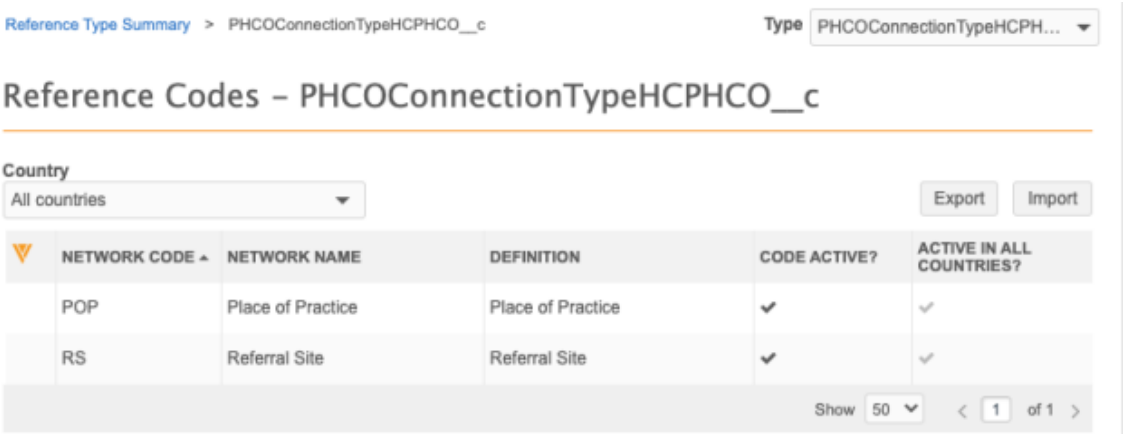
For each relationship, you can define how you want to see the relationships identified on the Influence Map.

Example - HCO-HCP relationships

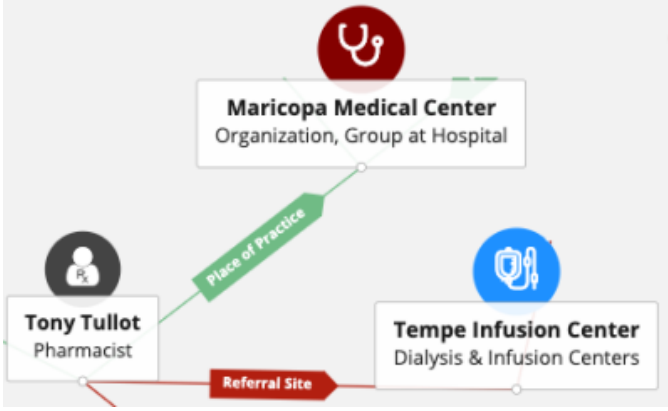
Expand the **HCO-HCP Relationship Info** list, to choose one of these options:

- **No label** - Display only the connecting line between related objects only.
- **Arrow Only** - Display an arrow on the connecting line to identify the direction of the relationship.
- **Connection Type** - Display a label that describes the type of relationship between the HCO-HCP.

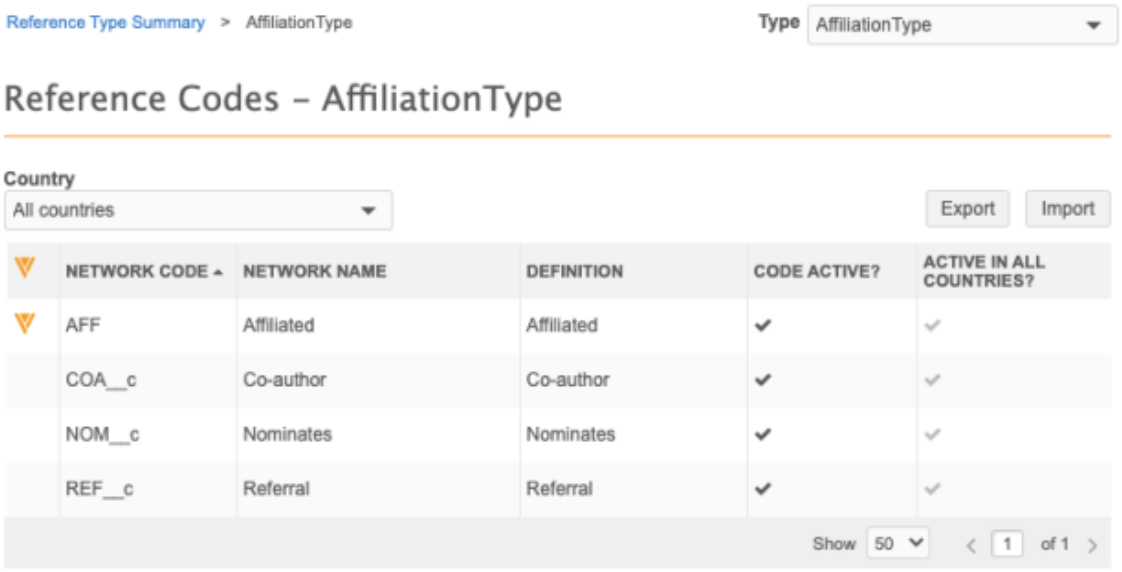
  This option is mapped to the custom field that you have defined for the Parent HCO object for these relationships. To add custom fields for relationship labels, contact Veeva Support.



  When **Connection Type** is selected, the relationship label displays the reference value.

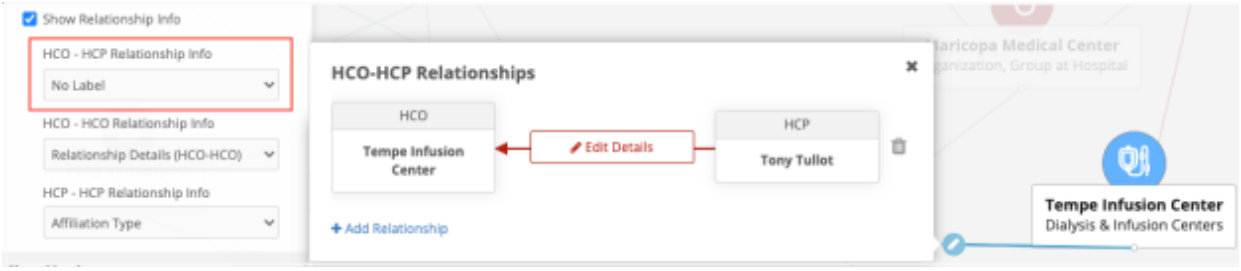


Similarly, the HCO-HCO relationship will have these options with the custom field that is created for those relationships. The **HCP-HCP Relationship Info** list always contains the Affiliation Type field. When you edit the relationship details on the Influence Map, you can update the label with the type of affiliation based on the reference values for the field.

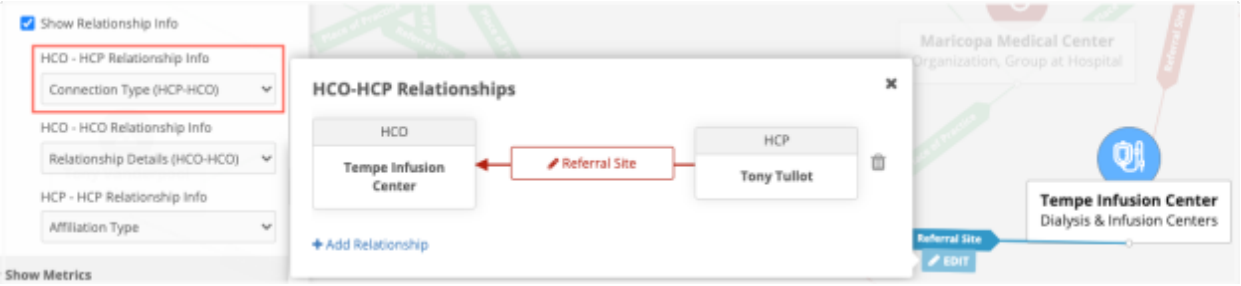


Editing relationships

When you edit a relationship (click on the connecting line between the two objects), the pop-up displays the relationship label. If you have chosen **No Label** or **Arrow Only** for the relationship info in the **Tools** menu, the **Edit Details** label displays between the two objects.



If you chose to display the label, the pop-up displays the current label for the relationship.



REPOSITION RELATIONSHIP LABELS

21R1.1

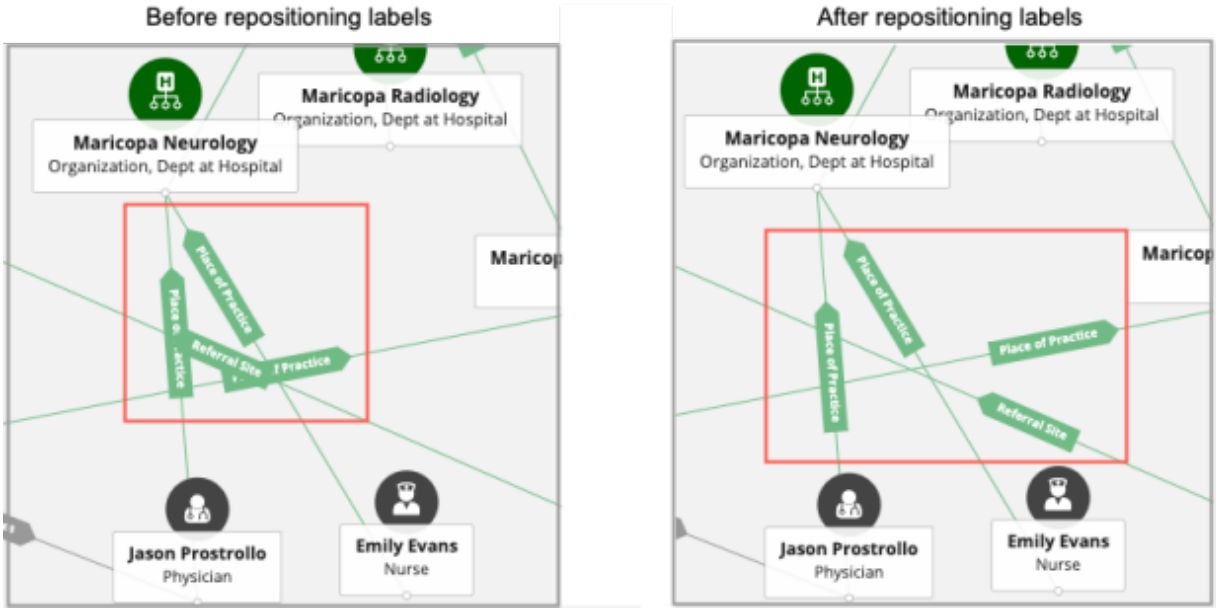
Users can now move the relationship labels on the connecting lines between two entities. This is helpful to avoid overlapping when Influence Maps are large.

This enhancement is available by default.

Move a label

To help you to clearly read relationship labels, you can reposition it on the connecting line. For example, if you have labels that are overlapping or very close, you can move them to improve readability.

To move the label, hover your cursor over the label and drag it to a different position.

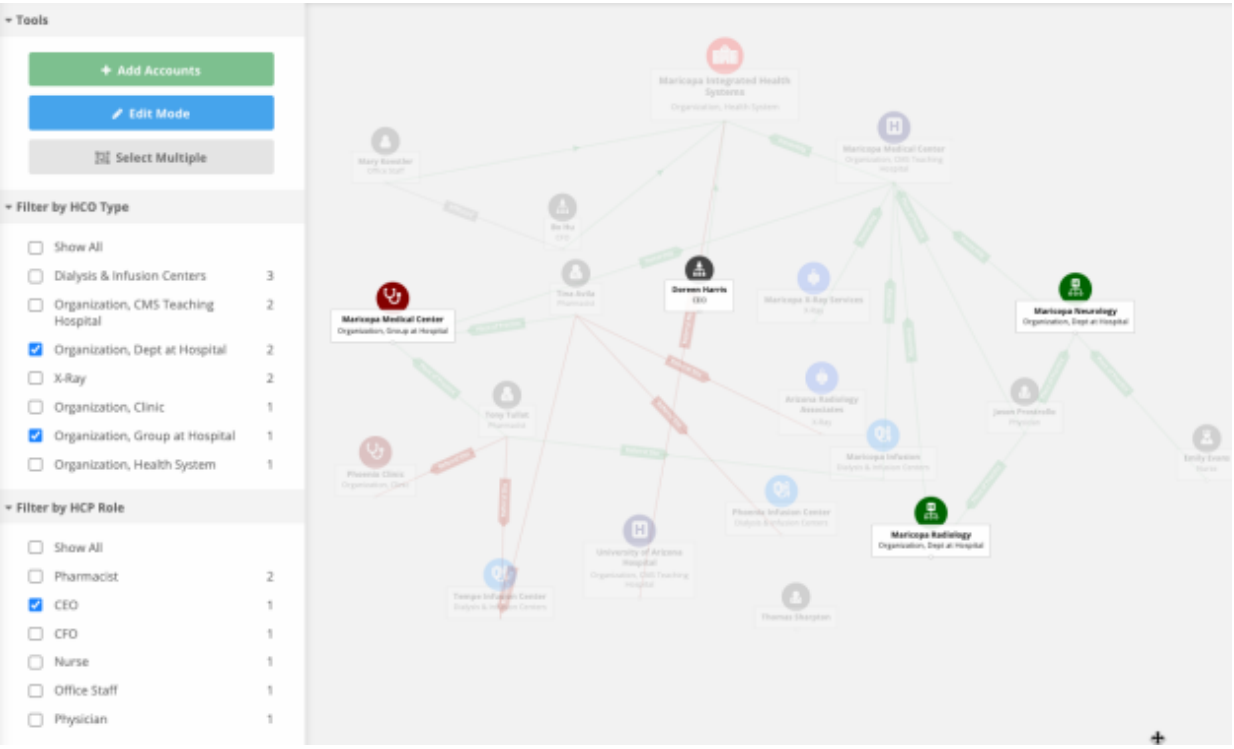


FILTER BY HCP/HCO

21R1.1

You can now use filters to highlight specific HCPs and HCOs on the Influence Map. When the filters are selected, records and relationships that are filtered out are dimmed so you can easily see which accounts apply to your selections.

You can also use the **Filter** section in the **Tools** menu as a quick overview of your health system. For example, you can easily see the number of Clinics or Infusion Centers in the health system.

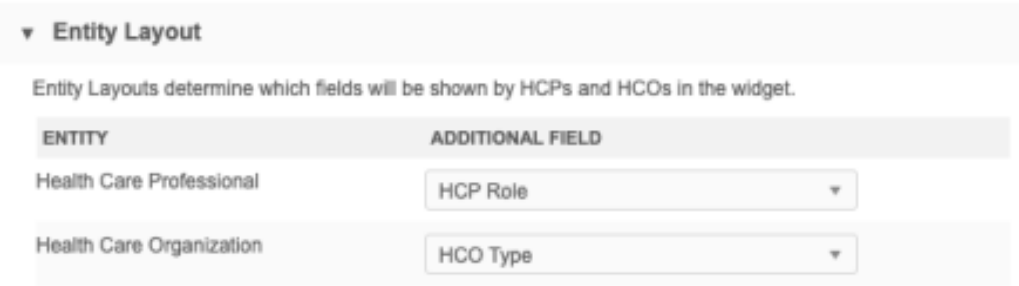


The ability to filter is enabled by default in your Affiliation widget Influence Map.

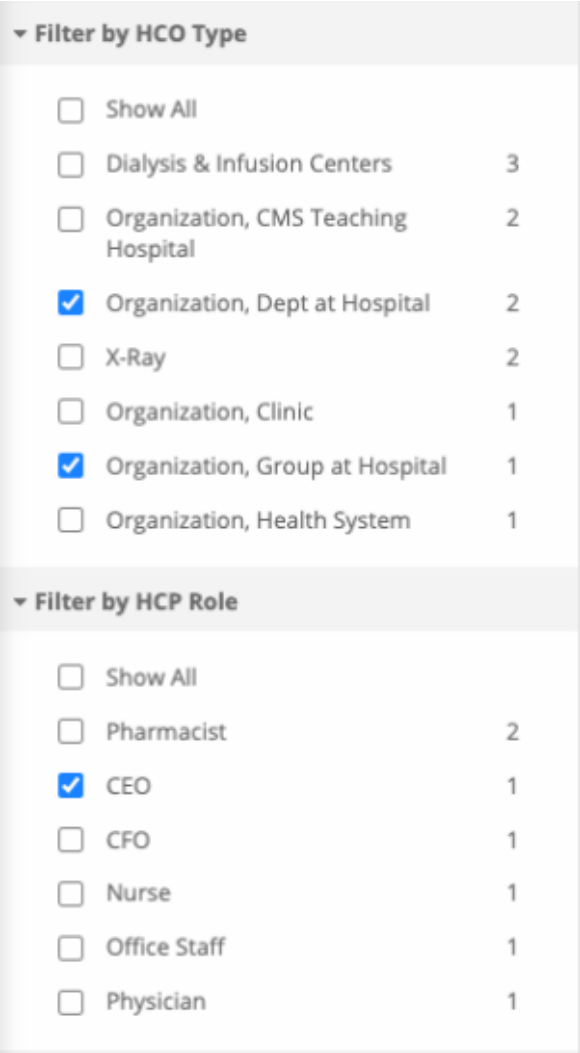
Filter types

Filters are based on the customized branding field used for the entity icon and color. If custom branding has not been defined for the entity, then the entity layout field that you defined in the Affiliation widget configuration is used.

In this example, the Entity Layout field for HCPs is **Role**, so HCP filtering is based on role. Similarly, HCOs are labeled by **Type**, so HCO filtering is based on type.



These fields map to the HCO/HCP filtering options available in the Influence Map.



The reference values for the field display based on the health system's country. For example, if the health system is in the United States, only US reference values display. A count beside each reference value represents the number of HCPs and HCOs labeled with that value on the Influence Map.

The reference value list is sorted by count and then alphabetically. If there are more than 10 values in the list, click **Show More** to view additional values.

Note: If the entity layout field is a text field, the filter sections do not display in the **Tools** menu.

Custom branding

If custom branding fields have been applied, they are used instead of the entity layout fields.

EDITING PROFILES

21R1.1

An **Edit** button is now available on profile previews so you can immediately update a record. This is particularly useful for updating the entity labels that display on Influence Map to support HCP and HCO filtering. For example, if you download a record from Veeva OpenData and the field that you use for the entity label (for example, HCP Role or HCO Type) does not have a value, you can immediately add a value so that record can be included in filtering.

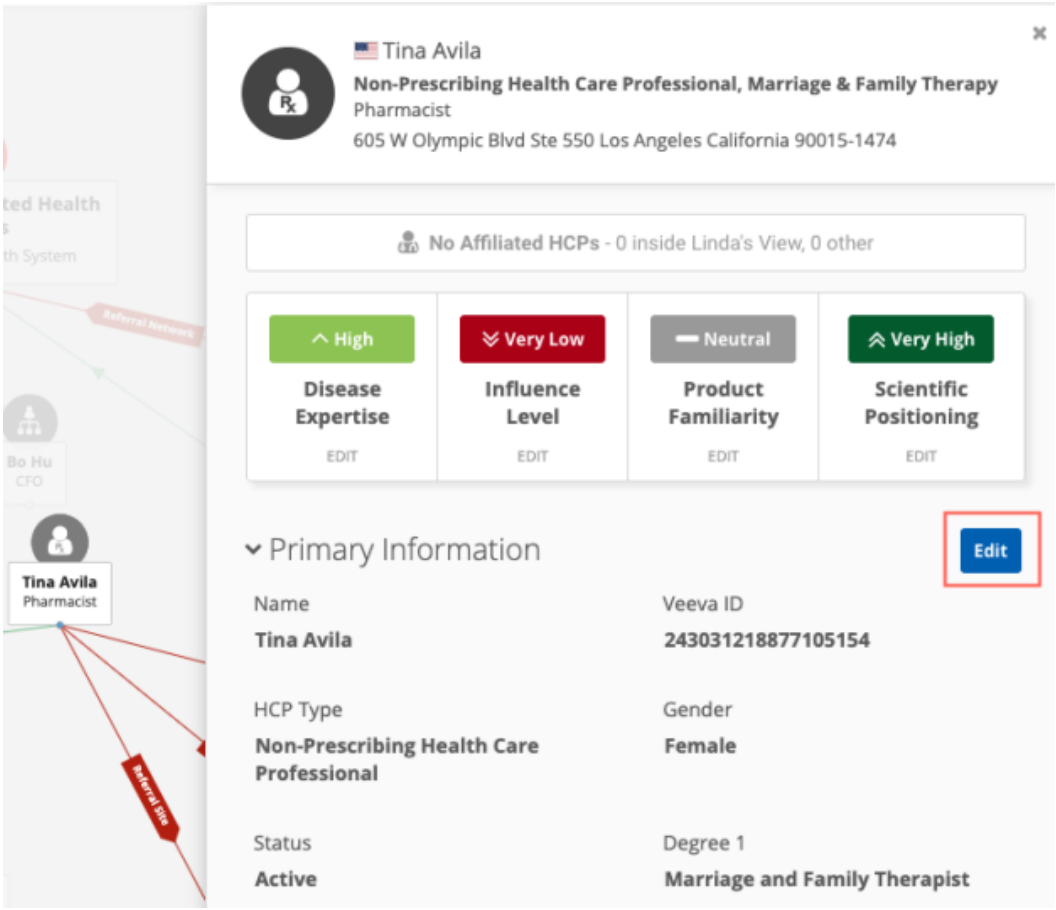
This enhancement is enabled by default.

Edit a profile

Click an account on the Influence Map or the Account List to view a profile preview. The **Edit** button is available below the metric details. The button does not display if the Affiliation widget is in read-only mode.

To edit the record:

1. Select the account on the Influence Map to open the profile. Click **Edit**.
2. Add or update the field values on the record. If you have restricted access to a field, the field cannot be edited.
3. Click **Save**.
4. In the **Confirm Changes** dialog, optionally type a note to provide details to the Data Stewards that will process the change request.
5. Click **Submit** to route the changes to be processed. If the field is automatically approved, the Influence Map is immediately updated.



Hide the Edit button

If the Affiliation widget is embedded in the Network Portal and you do not want users to make changes to record data, you can hide the **Edit** button. Use the **Advanced settings** in the Network Portal application.

If the Affiliation widget is embedded in an internal application, Web developers can add a property to the generated widget code to hide the **Edit** button.

Property

```
hide-edit-profile-button="true"
```

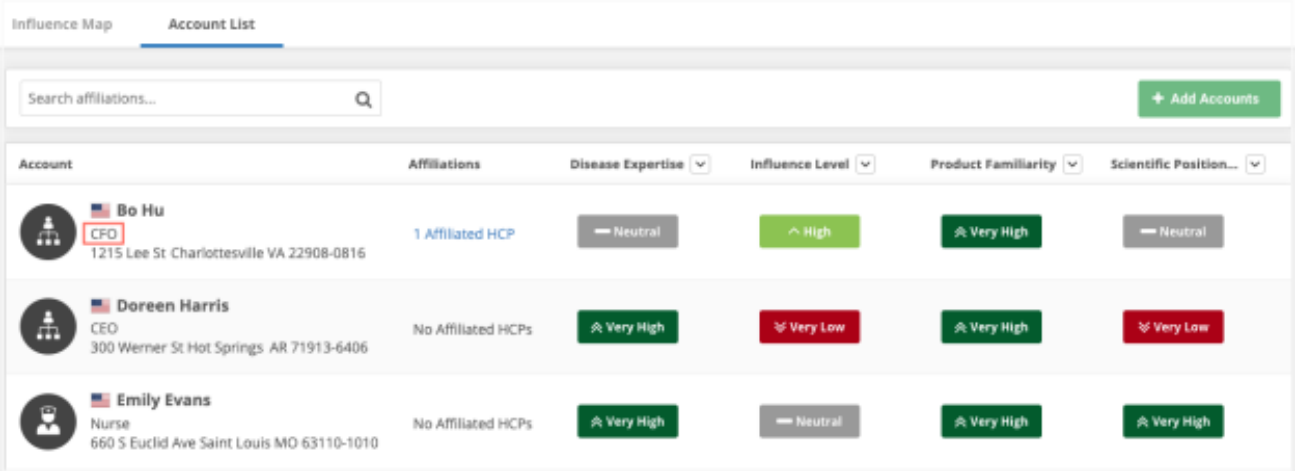
Example code

```
<veeva-network-affiliation-widget
     widget-name="AffWidget"
     auth-domain="my.veevanetwork.com"
     widget-id="MTAwMDI7OztzZXJ2aWNlY2xvdWRhX19j"
     hide-edit-profile-button="true">
 </veeva-network-affiliation-widget>
```

ACCOUNT LIST UPDATES

21R1.1

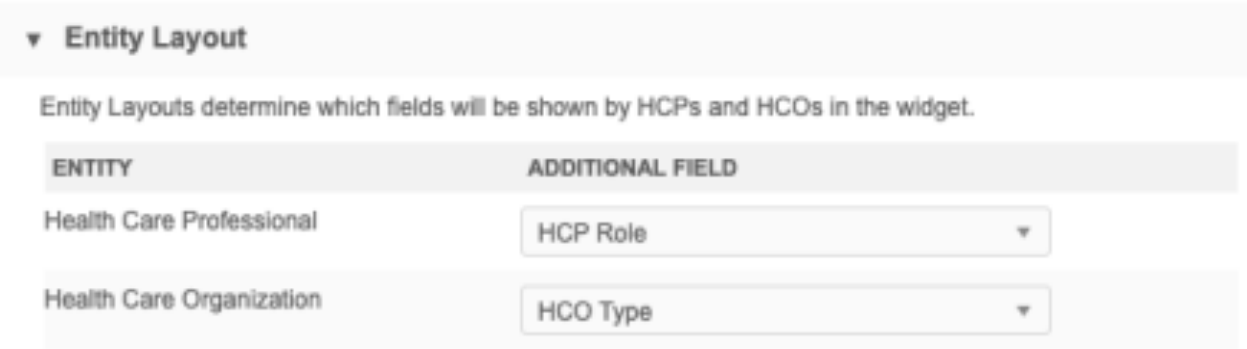
The entity layout field now displays on records in the Account List to help you identify HCPs. Previously, the field displayed on the accounts in the Influence Map only.



This enhancement is enabled by default for your Affiliation widget.

Entity layout field

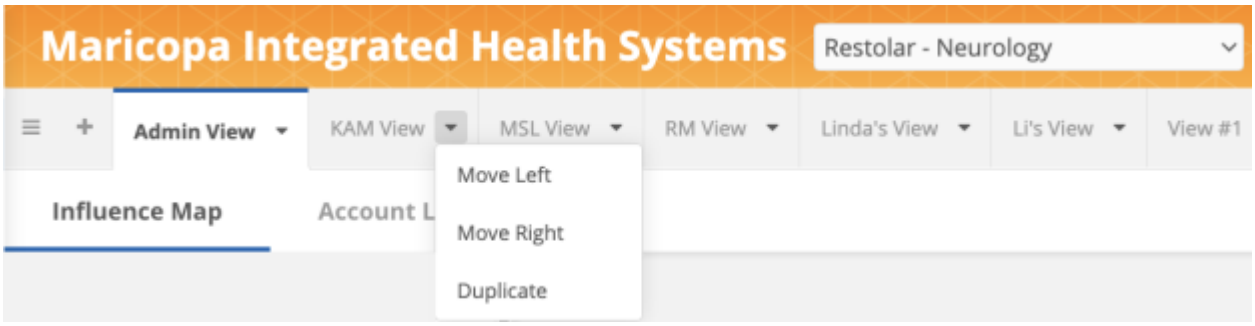
This field is configured in your Affiliation widget configuration. It can be a custom field or a Veeva field. If the field is empty, no value display on the **Account List**; only the HCP's address will display.



REMOVING STANDARD VIEWS

21R1.1

Standard views can no longer be deleted from the Influence Map. Previously, they could be removed by any widget user. Standard views are created by Veeva Support upon request, so the **Delete View** option has been removed to prevent the views from being inadvertently deleted.

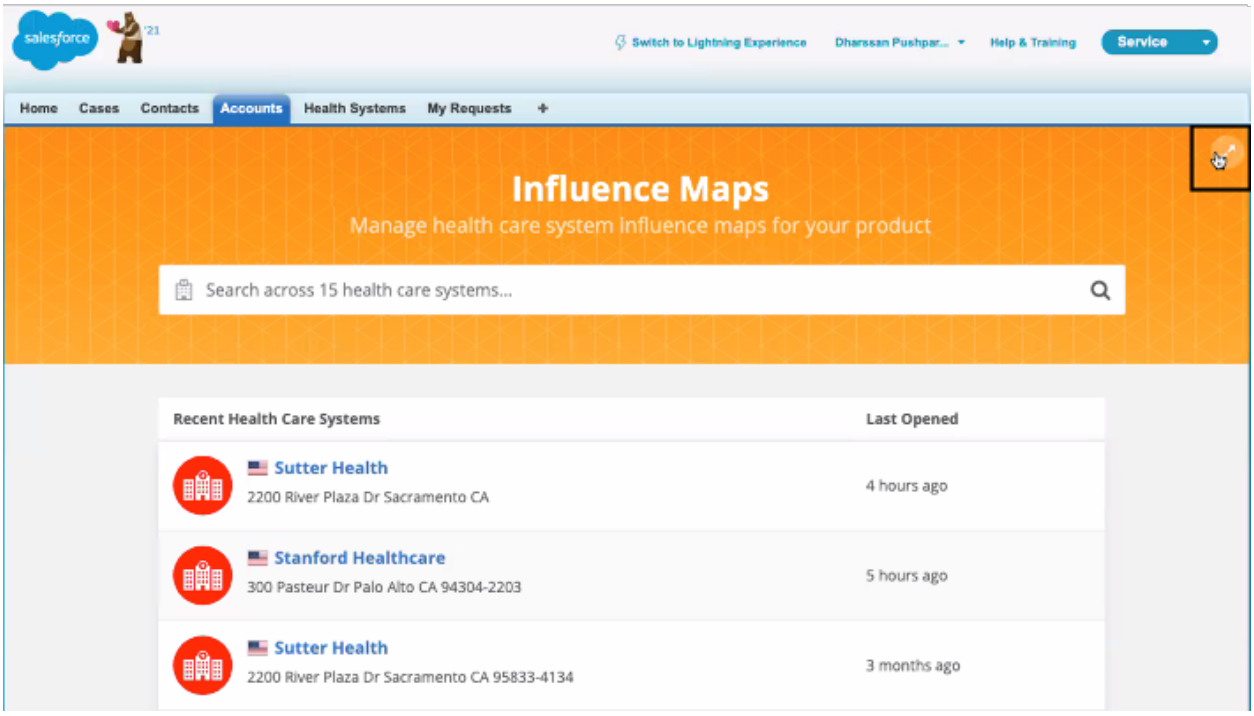


This change is enabled by default in the Affiliation widget.

FULL SCREEN SUPPORT

21R1.1

The Affiliation widget can be viewed in full screen when it is embedded in Salesforce Classic™. Use the **Full screen** icon in the top right corner to expand the Affiliation widget.



This enhancement is not enabled by default.

Enable full screen mode

To support full screen mode, Web developers can add a new property to the generated Affiliation widget code that is embedded in your internal application.

Property

```
full-screen-mode="true"
```

Example code

Add the property to the end of the generated code.

```
<veeva-network-affiliation-widget
     widget-name="AffWidget"
     auth-domain="my.veevanetwork.com"
     widget-id="MTAwMDI7OztzZXJ2aWNlY2xvdWRhX19j"
     full-screen-mode="true">
 </veeva-network-affiliation-widget>
```

Search widget

SEARCH LOCAL RECORDS ONLY

21R1.1

A new property is now supported to restrict users to search results in your Network instance only; results from Veeva OpenData will not display. Using this setting returns a significantly fewer number of results and prevents users from seeing records that might not be relevant.

Property

```
search-local-only="true"
```

Web developers can add the property to the generated widget code in your internal application.

Example code

```
<veeva-network-search-widget
     widget-name="ServiceCloudA"
     auth-domain="my.veevanetwork.com"
     widget-id="MTAwMDI7OztzZXJ2aWNlY2xvdWRhX19j"
     search-local-only="true">
 </veeva-network-search-widget>
```

Data components

VIEWING EXTERNAL DATA IN NETWORK

21R1.1

Users can view external data related to HCPs, HCOs, and custom objects directly from the Network UI using data components. Administrators can create a component to query specific data from Salesforce orgs (for example, Veeva CRM and Salesforce Service Cloud™) so users can access Salesforce data from Network record profiles. Data stewards can also access the data from data change requests.

For example, to validate a primary address change, Data Stewards can access the latest call data from Salesforce to verify the recent addresses that have been visited for an HCP; this helps them to know if the change is valid.

This feature is enabled by default in your Network instance.

About data components

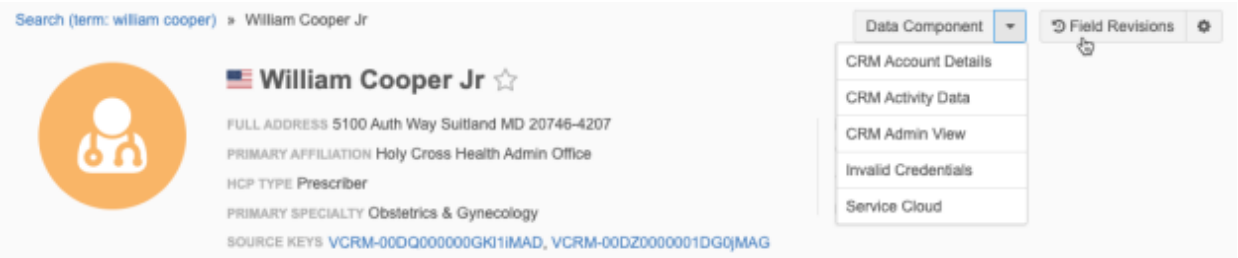
Administrators can create data components so users can access Salesforce data without logging into external applications like Veeva CRM and Service Cloud. Network users can click the **Data Component** button on record profiles or data change requests.

Data components can be restricted by user, entity, and country. If the button does not display, it might be unavailable to you through your assigned user group, or it might be unavailable for the entity type or the primary country of the record.

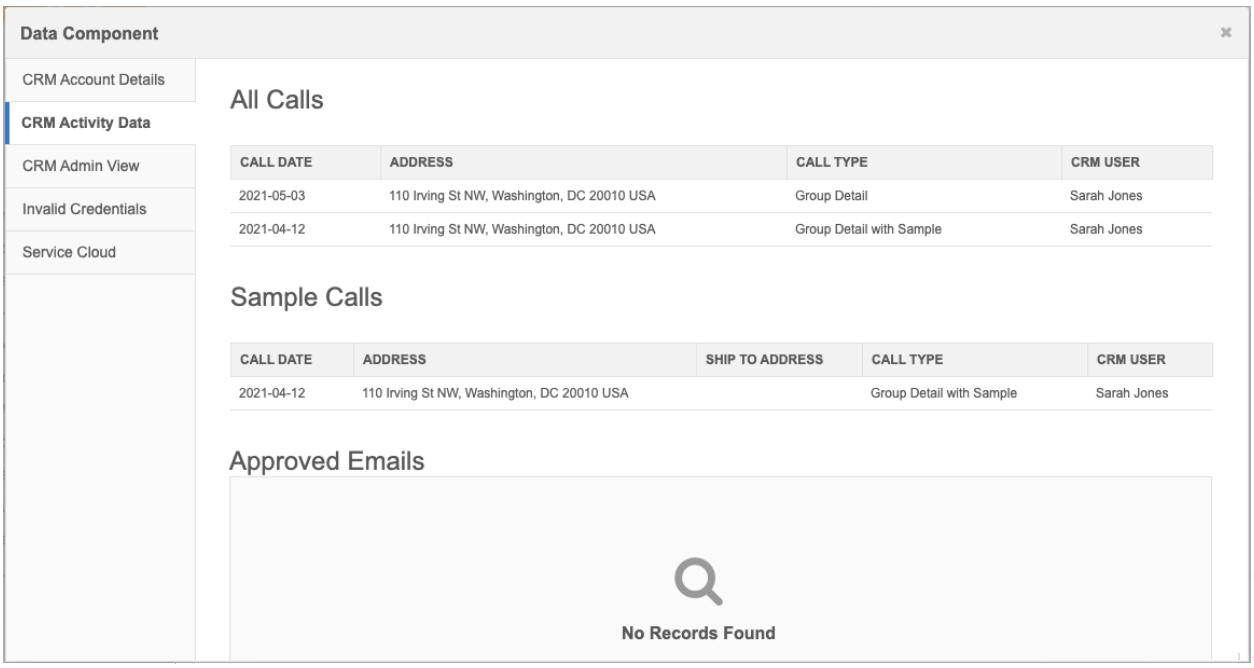
Profile page

The Data Component button displays on record profiles. Expand the list to see all the components available for the record. Each component is connected to a different Salesforce org and may contain different types of data. Network administrators create each component and customize the data that is available to view.

The components are listed alphabetically.



When you select the **Data Component** button, the first available data component will be opened. When you select a specific component from the list, the **Data Component** dialog opens to that component. There might be several sections for a component. Each section contains specific data. For example, there could be a section for Addresses, Account Information, and Call Details.



When there is no data available, the **No Records Found** message displays in the section.

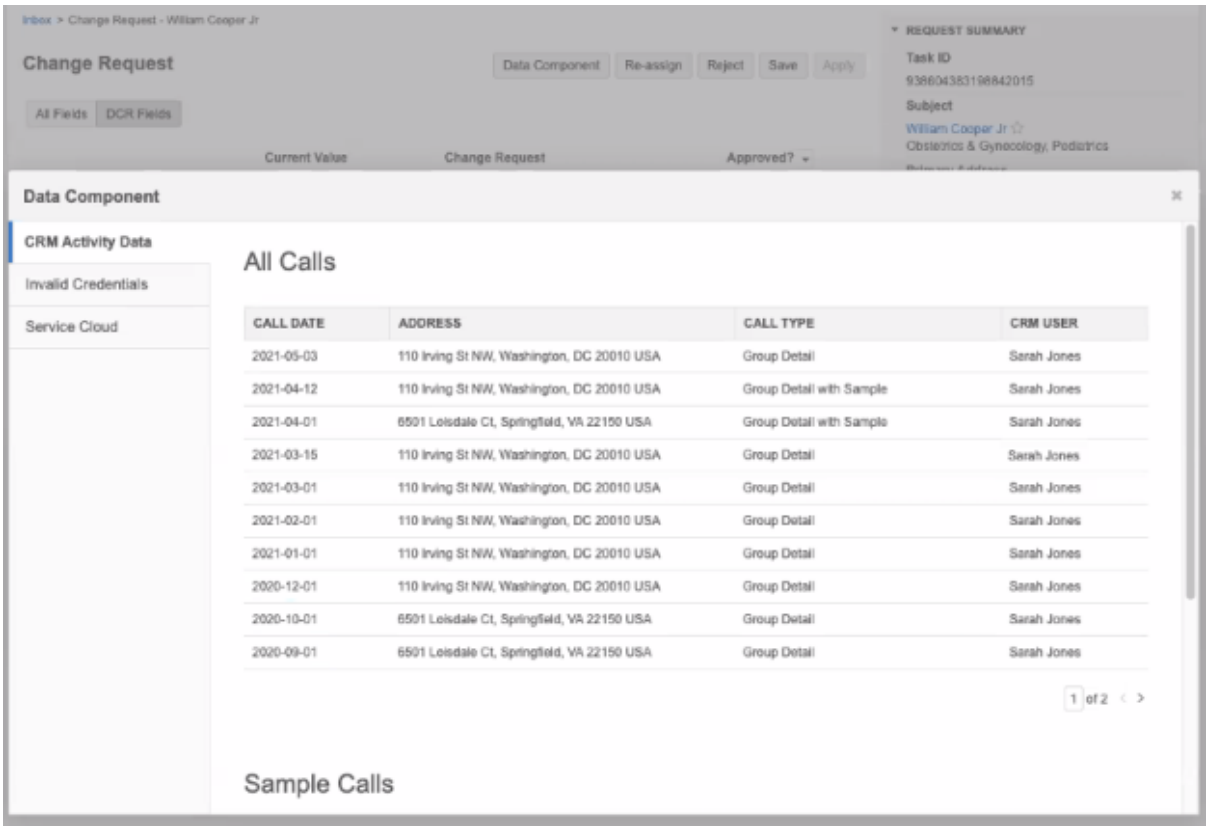
Data change requests

Data Stewards and Data Managers can view data components on add requests and change requests. When you click the **Data Component** button from a DCR, it opens to the first component that is listed alphabetically.

Note: On add requests, if the Create Unverified feature is not used on the DCR, the **Data Component** button does not display because the record does not yet have a Veeva ID.

Example

A change request is submitted by a sales rep, Sarah Jones, to change the primary address for an HCP. When she submitted the request, Sarah added a comment that she's been visiting the HCP at a new address recently. To validate this change, the data steward can open the data component to see the latest call data on the HCP's CRM account.



CREATE A DATA COMPONENT

Administrators can create data components.

1. In the Admin console, click **Widgets & Portal > Data Components**.
2. Click **Add Data Component**.
3. In the **Details** section, define the following:
    a. **Name** - The unique name that will be used for the component on the profile and data change requests.
    b. **System** - The Network source system.
    c. **Type** - This is read-only. Salesforce is the default type.
    d. **Description** - A meaningful description that is used on the Data Components list page only.
    e. **Status** - The data component is **Enabled** by default.
    f. **External Credentials** - Expand the list and select the Salesforce org that you want to connect to retrieve the data.

    If the Salesforce org isn't listed, click **Create a New External Credential** to define new credentials for a Salesforce org.

    Click **Test Connection** to ensure that you can connect to the Salesforce org.

4. In the **Permissions** section, specify the records that the data component will display on and the users that will have access to it.
    a. **Countries** - By default, **All Countries** is selected. These are all the countries that you have set up in your Network instance. Choose **Selected Countries** to limit the component to specific countries. For example, you might want this component to apply only to specific countries in Europe.

       Expand the list to select the countries. Only the countries that are defined in your Network instance display in the list.

    b. **Entities** - By default, **HCP** is defined. Click the field to add entities. Veeva standard objects and custom objects are supported.
    c. **User Groups** - Define the users that can access the data component. By default, **All Users Except Integration Users** system managed user group is selected. Choose **Specific User Groups** enable the option to define different groups.

       Click **Add user groups to data component** to choose existing user groups. Click **Create a new group here** to define a new user group to use for this data component.

5. In the **Component Builder** section, use a SOQL query to retrieve specific data from Salesforce. Write your own query or click **Sample Queries** to use a predefined query.

   Each query that you define in the **Component Builder** is contained in a **Section**. When users view data components, the data displays under the section name that you define.

   Example section

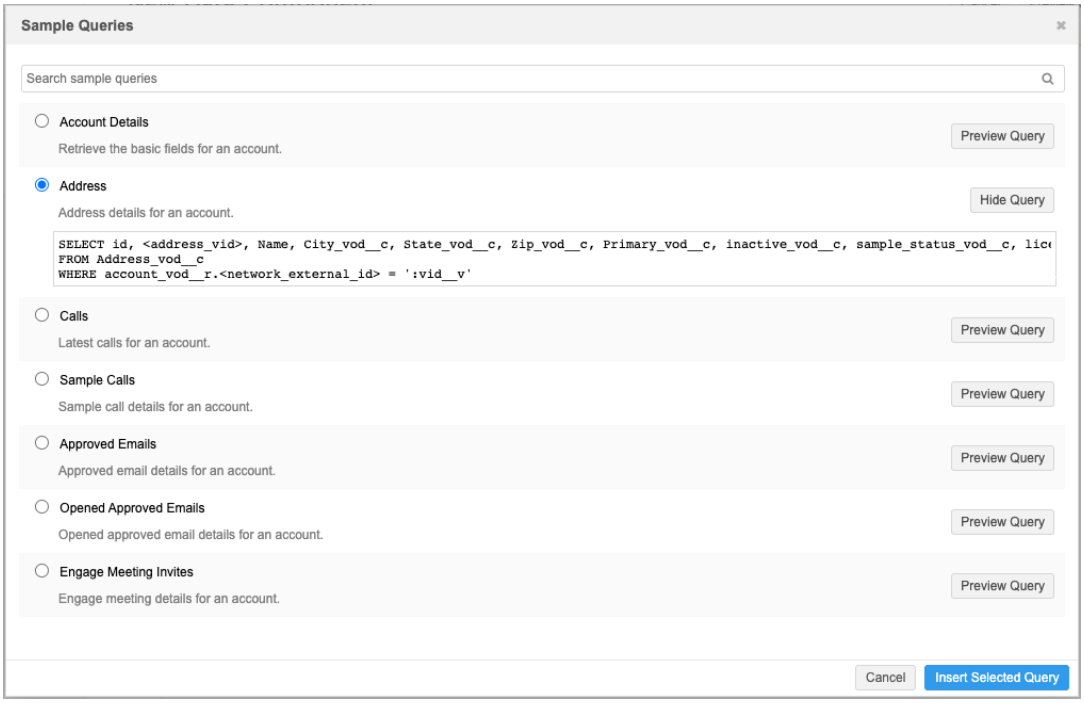
   Use the **Addresses** sample query so Data Stewards can see address data from Salesforce to help them validate primary address changes in DCRs.

To define a query:

a. In the section, write a query or click **Sample Queries** to use a predefined query.

If you click **Sample Queries**:

- In the **Sample Queries** dialog, select a query; for example, the **Address** query so users can view address details for an account.
- Click **Preview Query** to see the fields that are used for the query.
- Click **Insert Selected Query** to add it to your section. The query is inserted into the section query box.



About queries

Data component queries use fields from the Veeva CRM object. Some sample queries might have a placeholder for a field enclosed in angle brackets (<>). If the query contains these placeholders, replace it with the appropriate field that you use in CRM. For example, replace `<address_vid>` with `network_external_id__c`.

The Network field `vid__v` is included in the queries as a dynamic variable. The data component uses this variable to know which data to display when a user clicks the **Data Component** button on a record profile or data change request. Dynamic variables are in the format `':<field_name>'`. Typically, the dynamic variable will be the Veeva ID field, `vid__v`, but it can be any field depending on the type of data you are querying.

b. In the **Section Name** field, type a name for this data; for example, `Addresses`. This name will be the header in the **Data Components** dialog that displays the data for users.

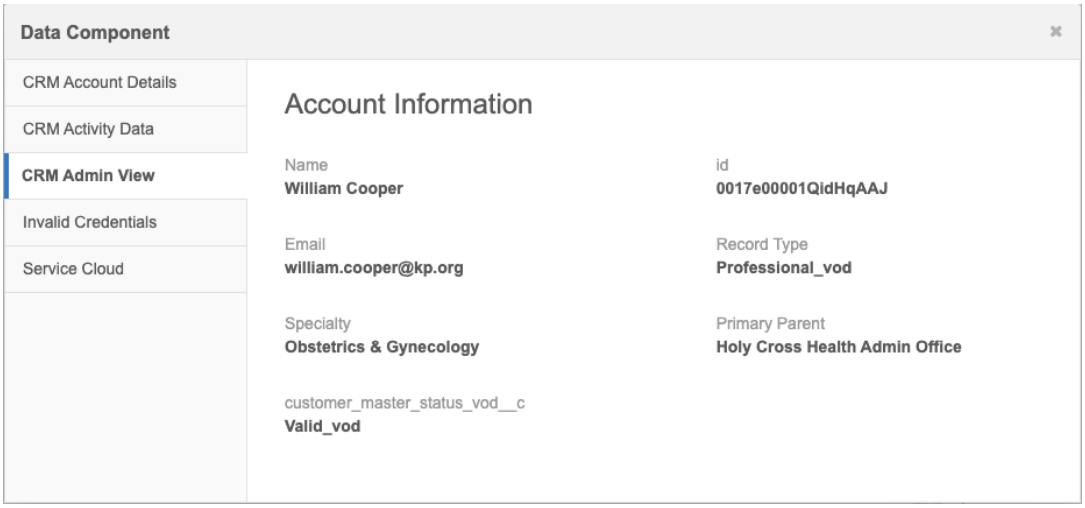
c. Choose the **View Type**. This is the format the data will be presented in the **Data Components** dialog that users view.

There are two view types:

- **Details View** - Use to display a single result; for example, account details.

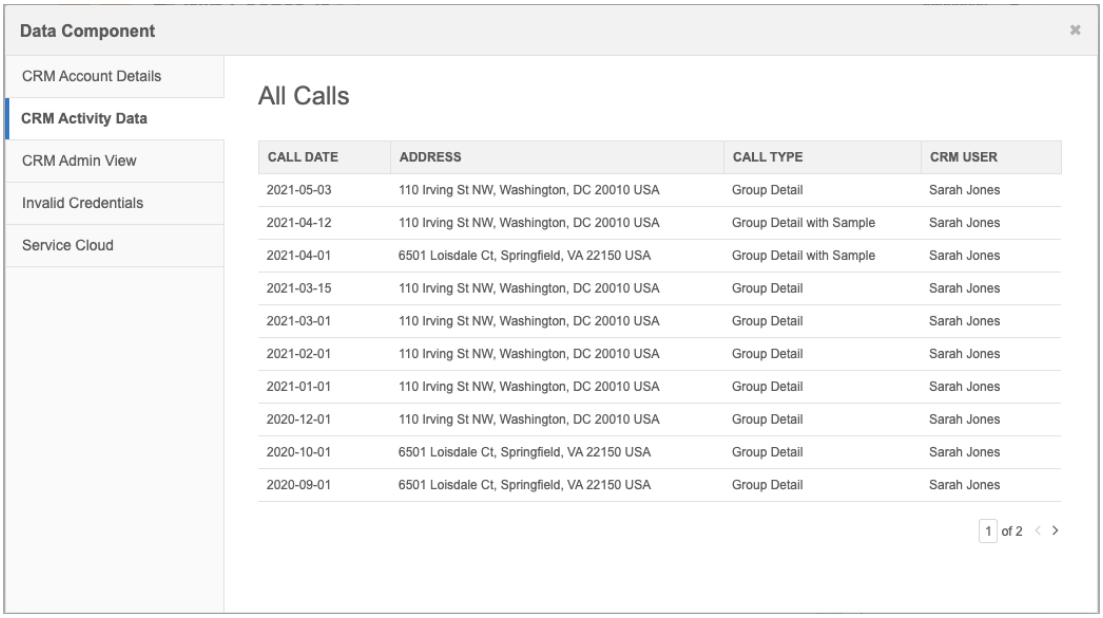
  If you use Detail view and the query returns more than one result, only the first result will display.

  Example Details view



- **Table View** - Use when you expect to return multiple results for an account. For example, address data or call data for an HCP.

  Example Table view



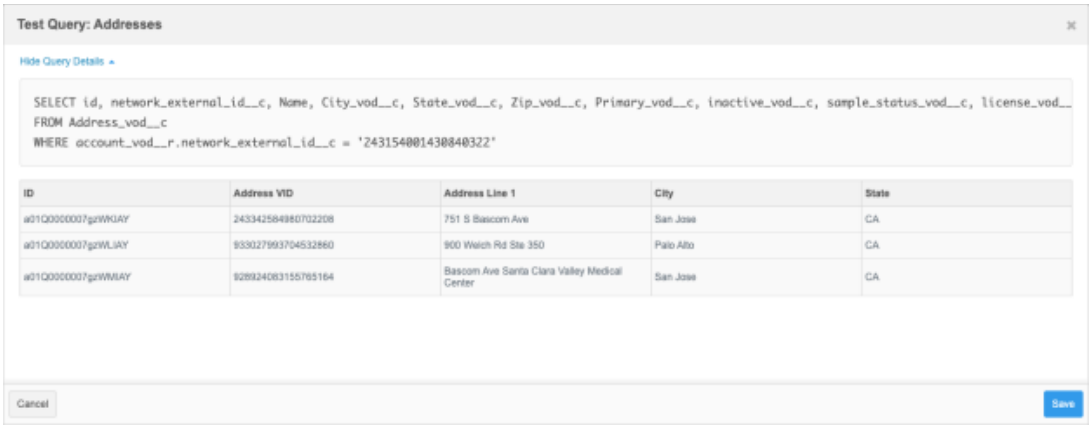
d. The **Headers** field contains a comma-separated list of the field names for the data. When you use a sample query, the headers are automatically populated but they can be changed.

   If no headers are defined, the column name is returned from the SOQL query.

e. Click **Test Query** to preview the results to ensure that this is the data you want to retrieve from Salesforce. Testing the query requires a record to retrieve the data. In the dialog, type a Veeva ID from a main entity (for example, HCP or HCO) so you can see the results. The **Test Query** dialog displays the query and the results.

Note: Your user permissions are used to test the query; not the country and user group permissions defined in the component. For example, if you submit a Veeva ID for a record in Spain but your data visibility profile permissions only include France and Germany, a permission error displays.

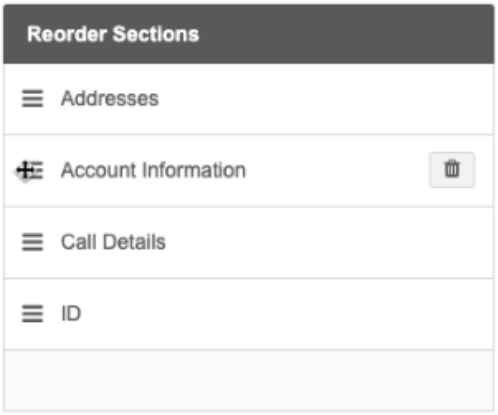
You can edit the headers that display. Editing and saving the headers in the **Test Query** dialog updates the **Headers** field in the section.



Notice that the Network field that was the variable; for example, `vid__v`, is replaced with the Veeva ID that you specified in the **Query Details** section.

Close the dialog to continue.

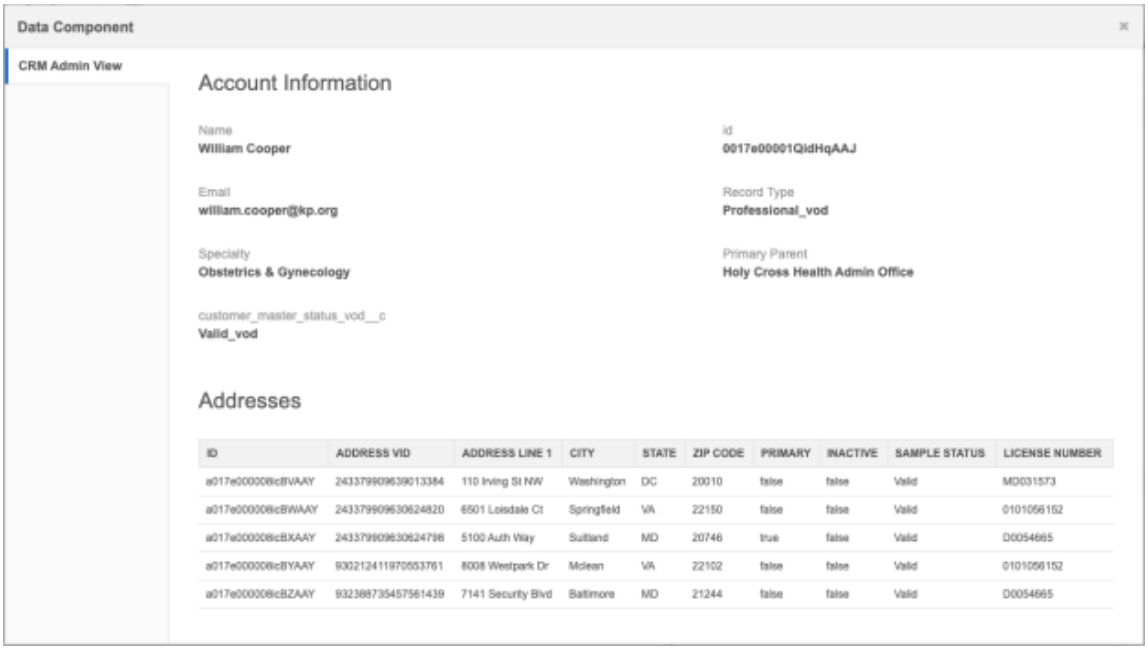
6. To add more sections, click **Add Section**.
7. In the **Reorder Sections** pane, all sections that you have defined are listed by section name. Use the **Handle** ≡ icon to move a section to reorder where it displays in the **Data Component** dialog to users. You can also use the **Delete** 🗑 icon to remove the section from the data component.



8. Click **Preview Component** to see how the Data Component will display for Network users. Enter a **Veeva ID** so you can preview the data for a record.

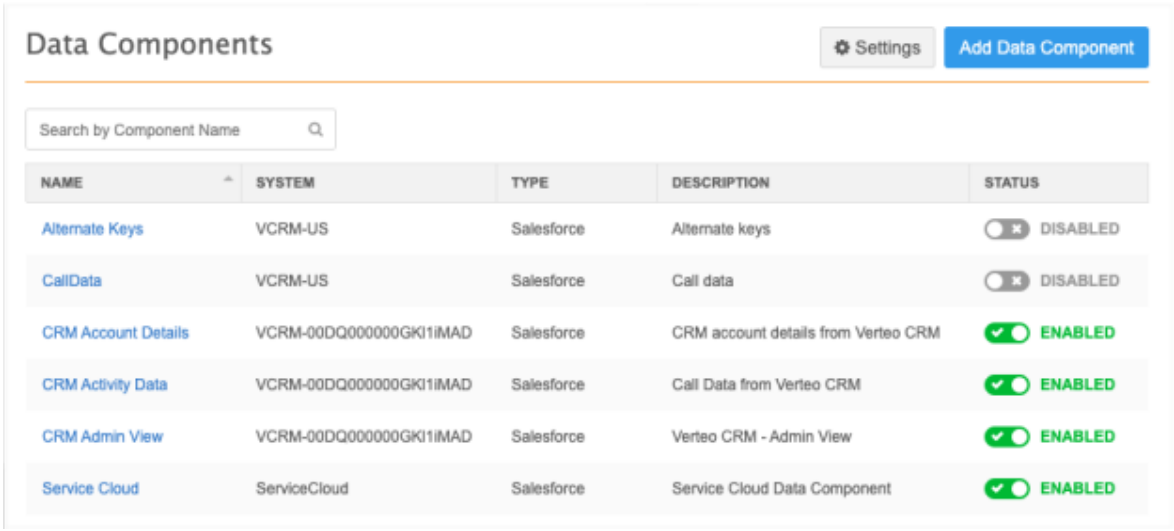
   Note: Your user permissions are used to preview the data component; not the country and user group permissions defined in the component. For example, if you submit a Veeva ID for a record in Spain but your data visibility profile permissions only include France and Germany, a permission error displays.

   The preview displays the component, all sections, and any data available for each section.



9. **Save** your changes.

The component will be added to the Data Component page.



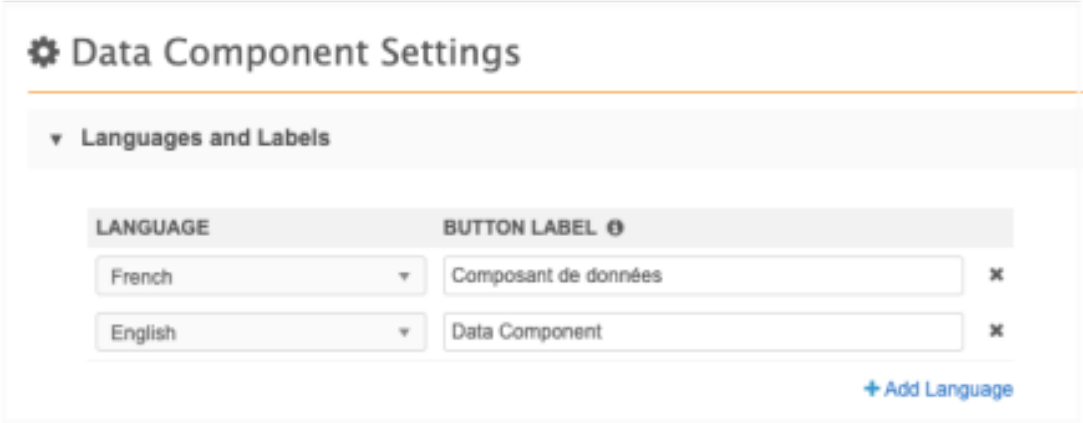
Data components can be enabled and disabled on this page. Disabled data components do not display on record profiles and data change requests.

Clone a data component

Use the **Clone** button to create a copy of the data component. Cloning the component copies most of the configuration except for the data component name or code.

Rename the Data Component button

Administrators can define the languages and labels for the **Data Component** button.



1. On the Data Components page, click **Settings**.
2. In the **Languages and Labels** section, click **Add Language** to define a localized label for the Data Component.

   By default, the **English** label is **Data Component**, but it can be changed.

3. **Save** your changes.

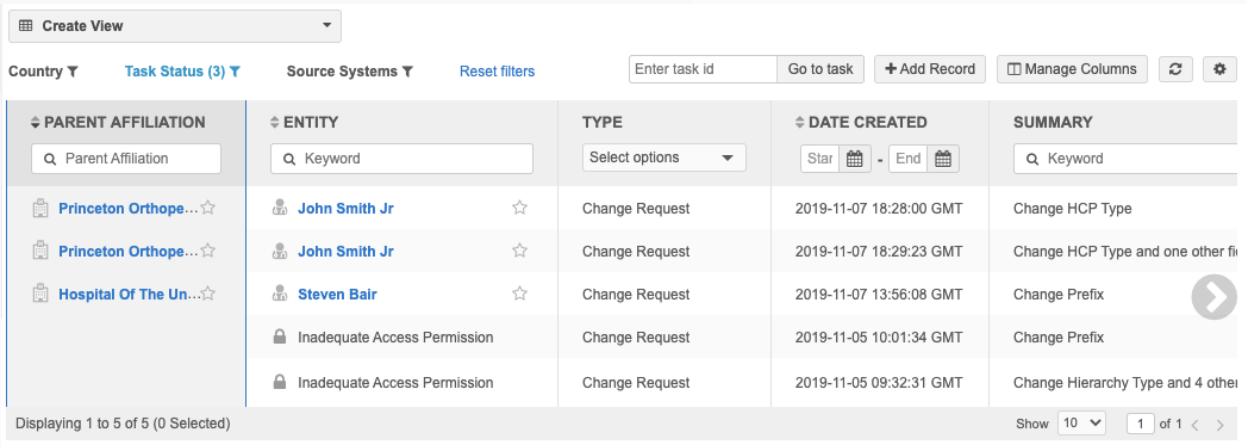
The button label will be updated for that language.

Inbox

INBOX SORTING

21R2

The inbox is updated to add sorting ability to more columns. This helps data stewards to quickly group tasks based on specific criteria. For example, data stewards can now sort tasks by parent affiliations to find and verify multiple HCPs working at the same parent HCO. Previously, data stewards had to filter and search for specific criteria. Highlighting has also been added to the inbox so you can easily identify the columns that are sorted, searched, or filtered.



This enhancement is enabled by default in your Network instance.

Supported columns for sorting

Support for column sorting is generally based on the type of data in the column. Most data model field types and task custom field types are supported, but there are some exceptions for the task columns that you can add to the inbox.

Review the tables below to understand which field types and task columns support sorting.

Field types

This list includes data model field types and task custom field types.

Field Type	Sortable?
Decimal Number	✓
Integer number	✓
Text	✓
Date (no time)	✓
Date and time	✓

Field Type	Sortable?
Alternate key	✓
Reference	✗
Checkbox	✗
Primary	✗
User (task custom field type)	✗

Task columns

Review the sorting support for each task column in the table below.

Column	Field Type	Sortable?
Customer's Task ID	Veeva ID	✓
Task ID	Veeva ID	✓
Date Completed	Date and Time	✓
Date Created	Date and Time	✓
Entity Type	Reference List	✗
Address Change?	Reference List	✓
License Change?	Reference List	✓
Parent HCO Change?	Reference List	✓
Primary Department Change?	Reference List	✓
Task Status	Reference List	✗
Type	Reference List	✗
Assignee	Text	✗
Country	Text	✗
Creator	Text	✓
Entity	Text	✓
Requester Comments	Text	✓
Resolution Notes	Text	✗
Source System	Text	✗

Column	Field Type	Sortable?
Subject	Text	✗
Summary	Text	✗
Service Time	Time	✗

Number of inbox columns

The maximum number of columns that can be added to your inbox has been extended to 25 to ensure that you have the information required for managing tasks more efficiently.

Sorting columns

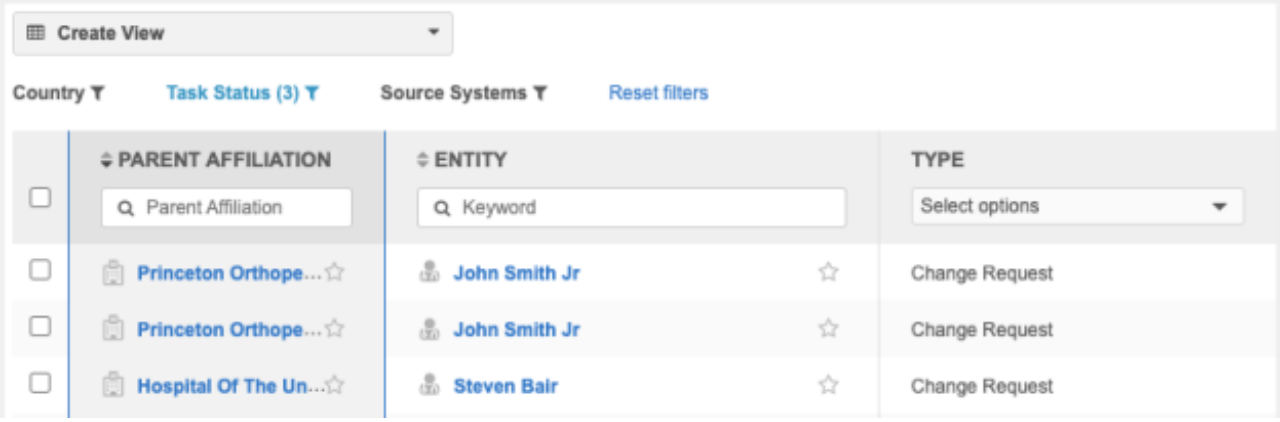
Columns can be sorted alphabetically in ascending or descending order so you can quickly group records and work on similar tasks.

To sort a column:

- Ascending order - Click the column once.
- Descending order - Click the column twice.

The sorting control **Arrow** icon remains highlighted in the selected sort order. The sorted column is also highlighted in gray.

Sorting is supported for one column at a time.



Remove sorting

To remove sorting, click **Reset filters** or sort another column. The highlighting is removed when the column is no longer sorted.

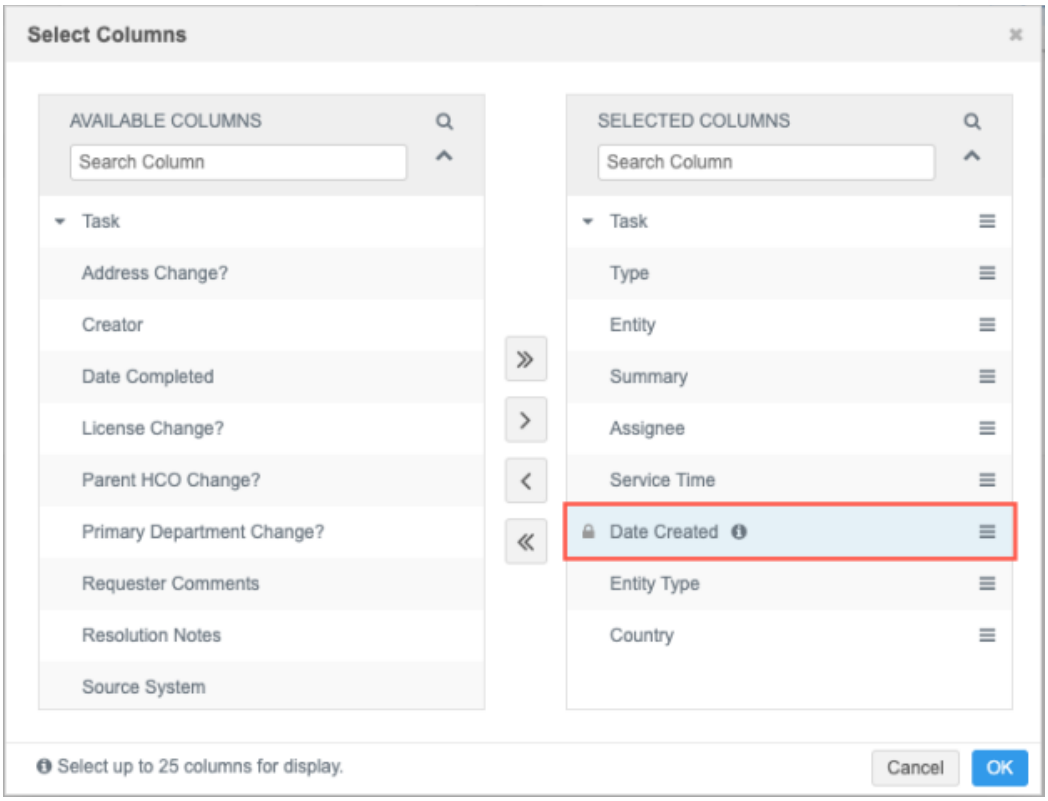
Default sorting

Inbox tasks are now sorted by the created date in descending order by default. This ensures that data stewards see the newest tasks first.

Previously, the inbox included the **Sort by Time** button at the top of the table. This has been removed and the **Date Created** column is added to the inbox by default. This column will also be added to all saved views when you access the view.

Note: If your existing view is saved with the **Date Created** column sorted in ascending order, that preference will be preserved.

The column cannot be removed from the **Select Columns** dialog. A **Lock** icon displays beside the column name to identify it as a default sorting field.

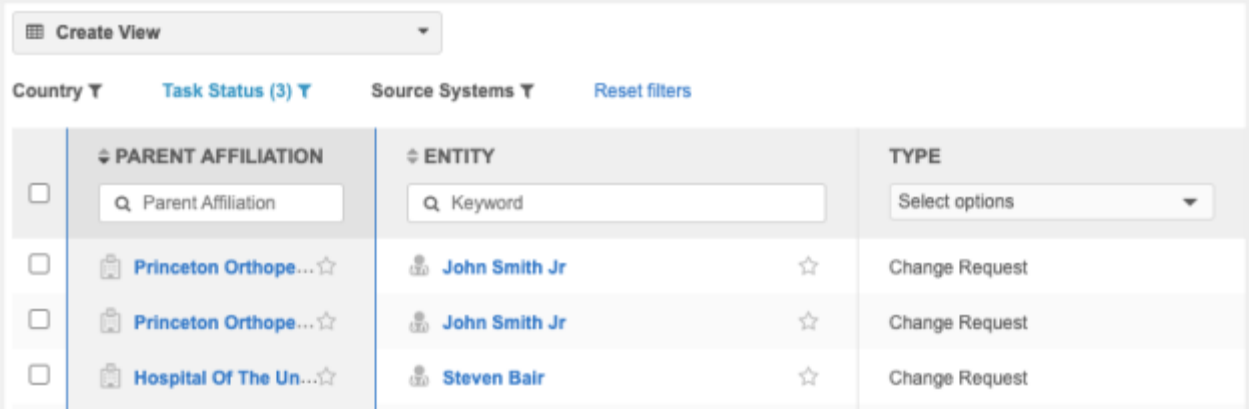


Highlighting

Columns that are sorted, filtered, or searched are now highlighted so you can easily identify the columns that are bringing the focus on specific tasks.

Sort highlighting

Columns that are sorted are highlighted in gray. The sorting control **Arrow** icon is also highlighted in the sort direction; ascending or descending.



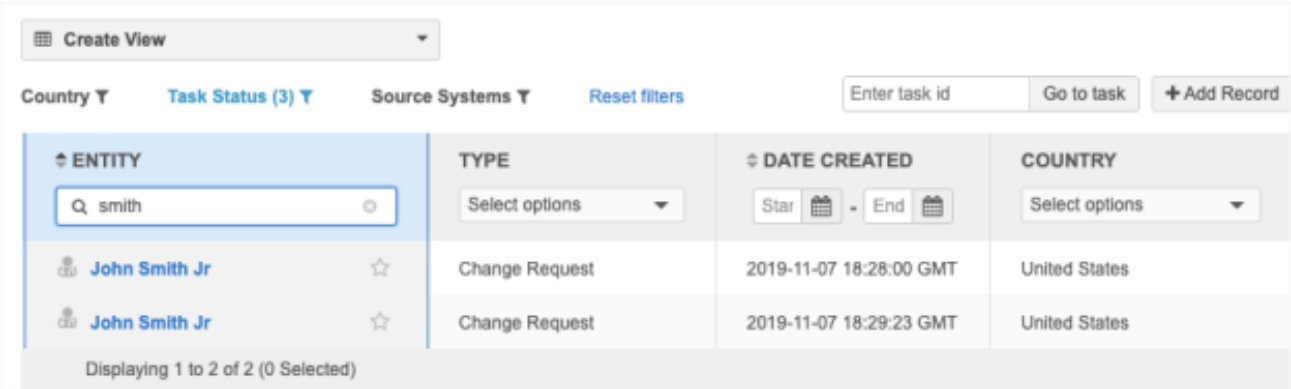
Filter or search highlighting

If columns have an active filter or contain a search term, the column header and the filter/search area is highlighted in blue.

The highlighting disappears when the filter is removed or the search term is cleared.

Sort and filter/search highlighting

If a column is sorted and filtered or searched, a combination of the highlighting is applied. The column rows are highlighted in gray to identify sorting, and the column header and search/filter area is highlighted in blue to identify search or filtering.



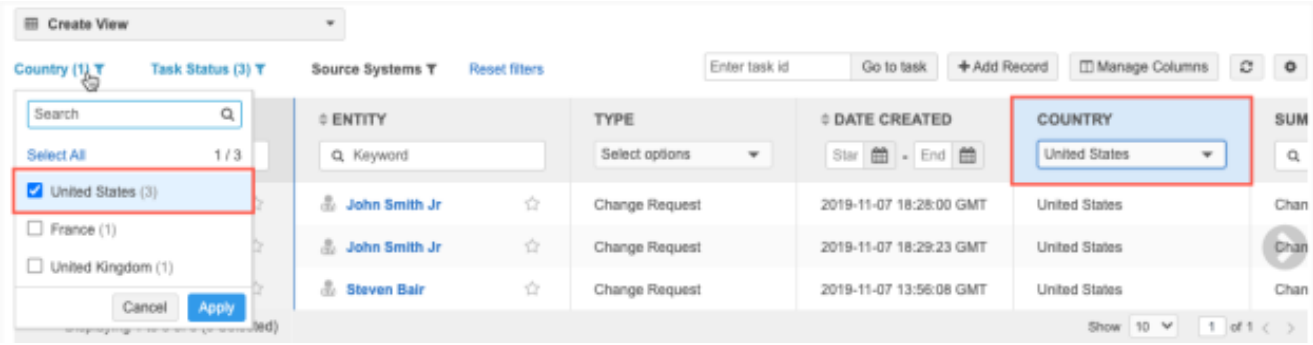
The highlighting disappears when the focus changes. For example, if sorting is no longer applied, the sorting highlighting disappears from the column but the blue filter/search highlighting remains. Similarly, if filter/search is no longer applied, the blue highlighting disappears but the gray sorting highlighting remains.

New columns

The **Country** column and **Resolution Notes** column are now available to add to your inbox so you can filter and search them just like the sortable columns.

Country

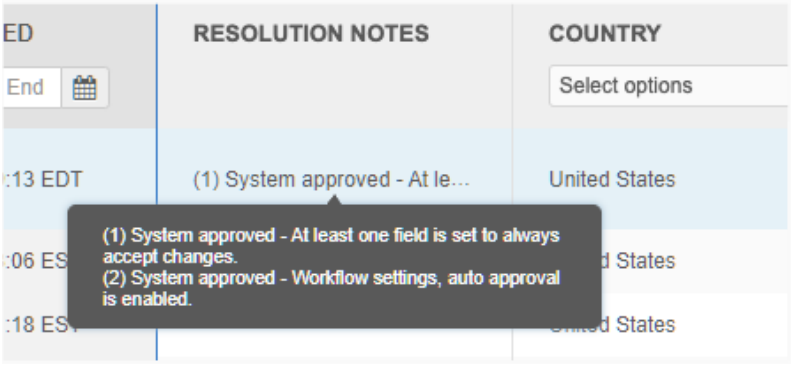
Country is also a top-level filter for the inbox table. If you add the column to your inbox and filter it for a specific country, the country will also be automatically applied to the top-level filter.



The **Country** column is not sortable.

Resolution notes

Resolution notes text will be concatenated in a long string within the column row. Hover over the string to view the entire Resolution Notes just as you would see on the task itself.



The **Resolution Notes** column is not sortable.

Add columns

To add these columns to the inbox:

1. Click **Manage Columns > Select Columns**.
2. In the **Available Columns** pane, expand **Task** and select **Resolution Notes** or **Country**.
3. Click the **Right Arrow** (**>**) icon to move it into the **Selected Columns** pane.

Inbox export

If you have permission to export tasks from the inbox, the sorted order of the tasks is maintained in the exported .csv file. Export permissions are granted by administrators through inbox task groups.

DATE COMPLETED

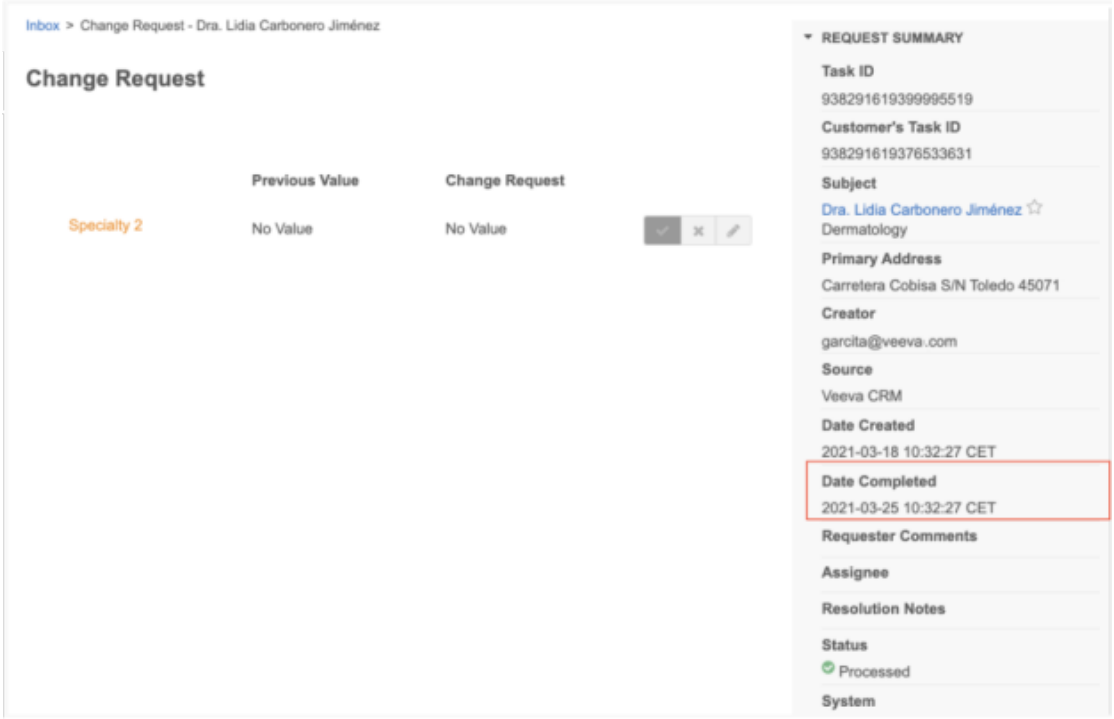
21R2

Data change requests and suspect match tasks now include the completed date and time so data stewards can easily investigate closed tasks.

This enhancement is enabled by default in your Network instance.

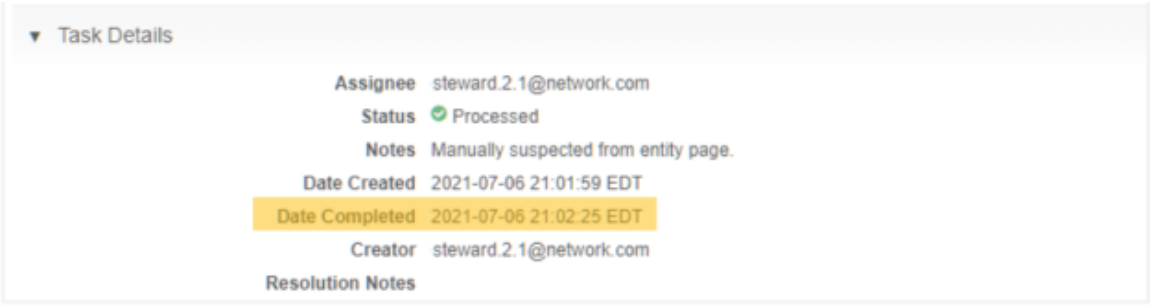
Data change requests

The **Date Completed** field displays in the **Request Summary** section. If the task has not been processed, the field does not display.



Suspect match tasks

The **Date Completed** field displays in the **Task Details** section. If the task has not been processed, the field does not display.



Reports

REPORTING DATABASE IMPROVEMENTS

21R2.0

Infrastructure improvements have recently been made to the Network reporting feature.

With these updates, you'll notice the following improvements:

- Reports complete faster.
- Reduced timeout errors.
- Fewer failures with saved reports.

These improvements are part of our ongoing focus to improve your experience with the reporting feature.

This enhancement is enabled by default in your Network instance.

SQL QUERY EDITOR

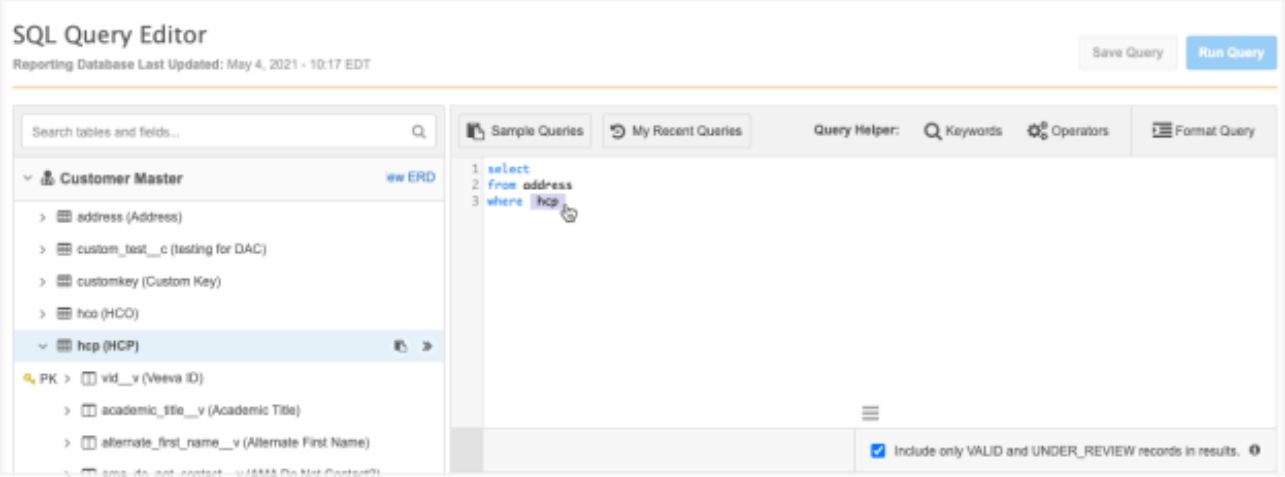
21R1.1

You can now drag and drop tables, fields, and reference codes from the SQL Query Editor tree view into the query box so you can easily build your query.

This enhancement is enabled by default in your Network instance.

Drag and drop

You can drag and drop tables, fields, and reference codes anywhere in the query box. When the table, field, or reference code is inserted, it remains highlighted so it's obvious where it was inserted. Spaces are automatically added before and after the item you drop into the query. After dropping an item into the query box, press the right-arrow key to continue writing your query.

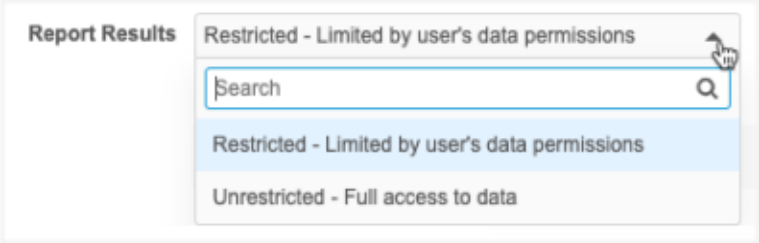


REPORTING PERMISSIONS

21R1.1

Administrators can assign a new user permission called **Report Results** so users can run reports without any data restrictions applied.

By default, when you run a report, the results are based on the data that you have permission to access. This means that each report query is rewritten to calculate your data visibility profiles, inbox task groups, and any dynamic access control restrictions for custom objects. This can cause the query to be slow or to timeout. When your data permissions are ignored, the queries and reports will complete faster and fewer timeout errors will occur.



Supported users

Administrators can assign this permission to the following user types:

- System Administrators
- System and Data Admins
- Data Managers

Change the permission to **Unrestricted** for users that already have access to all data. Report queries are always rewritten to calculate a user's data permissions, so if a user has access to all the data in the Network instance, assigning the **Unrestricted** permission means that the report runs without being rewritten and will complete much faster.

Data permissions

When you run a report, Network checks the following permission features to know which data you have access to:

- Data visibility profiles
  - Primary country
  - Object filters (object type, specialty, record owner type, and so on)
- Dynamic access control
- Inbox task group filters

Note: Field restrictions will still be applied.

Based on the data that you have access to, Network rewrites the report query to apply these filters. These data permissions can be ignored to avoid query timeouts. The only filter that is applied is the **Include only Valid and Under_Review records in results** option if you select that before you run the report.

Supported report features

The **Report Results** permission applies to anywhere in Network that you run a query or report:

- SQL Query Editor
- Basic Report Builder
- Aggregate Report Builder
- Saved Reports (manually run)

  Note: Scheduled saved reports are run using the data visibility profile of the user who last edited the report. These reports now include the **Last Modified by** information. Administrators can update the permissions for that user to ignore data restrictions.

- Data Quality Reports
- Data Maintenance Subscriptions

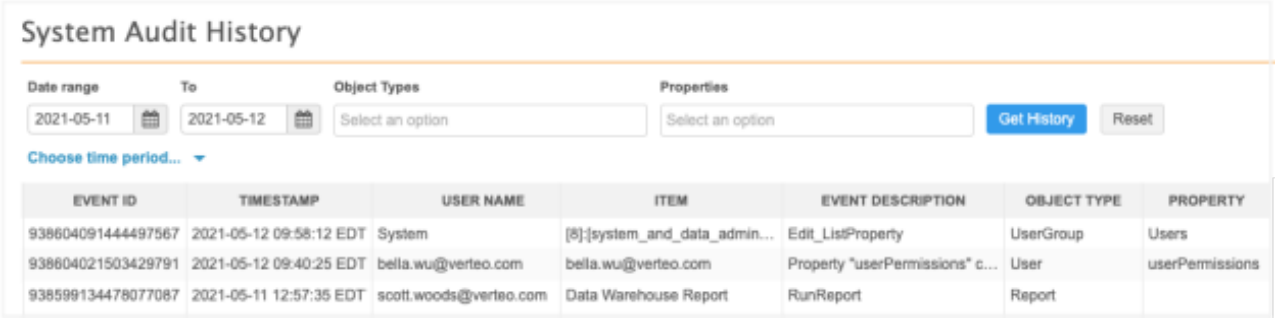
Apply the permission

By default, all users are restricted based on their data permissions.

1. In the Admin console, click **Users & Permissions > Users**.
2. Select a user.
3. In the **Additional Permissions**, expand the **Report Results** list and choose **Unrestricted - Full access to data**.

Logs

Changes to the **Report Results** permission are tracked in the System Audit Log.

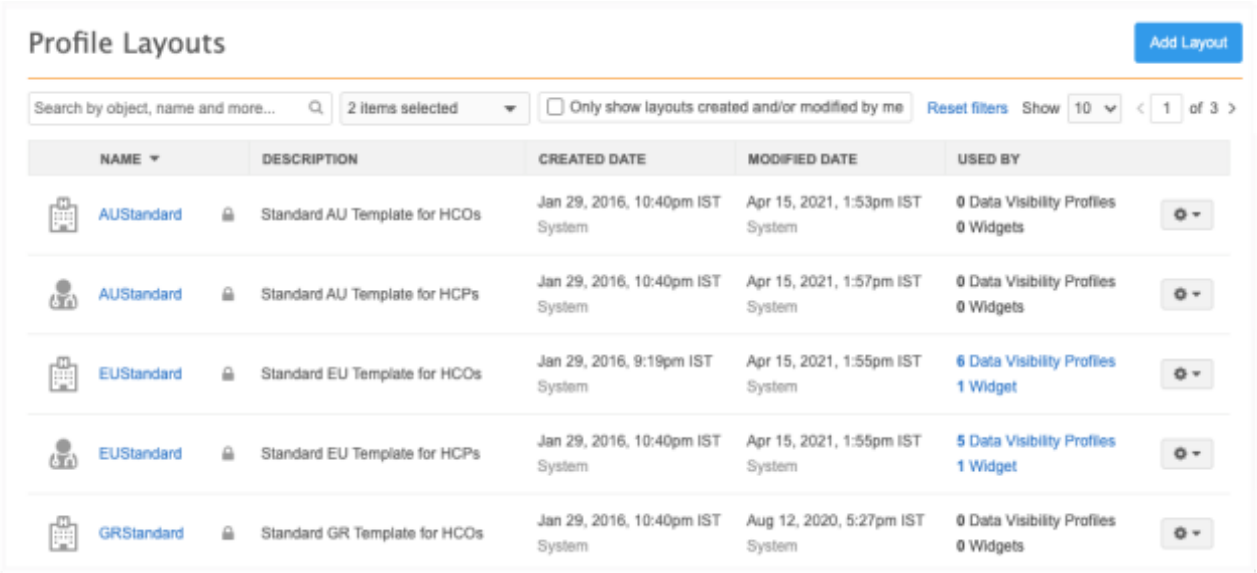


Profile layouts

USABILITY ENHANCEMENTS

21R1.1

Profile layouts are updated to provide more information about each configuration and where it is being used.



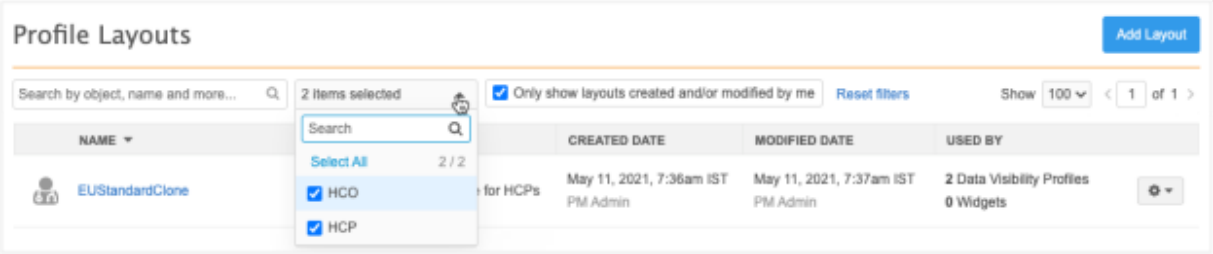
These enhancements are enabled in your Network instance by default.

Profile layouts list

The Profile Layouts page is updated to provide additional filtering and details for each layout configuration.

Filters

By default, the list displays all profile layouts for all objects and all users. You can filter the profile layouts list by object type and to display only the layouts that you have created or modified. If you make changes, click **Reset filters** to return to the default filtering.

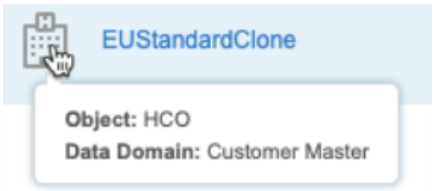


Details

The Profile Layouts list page (**Data Model > Profile Layouts**) is updated to provide the following details about each layout:

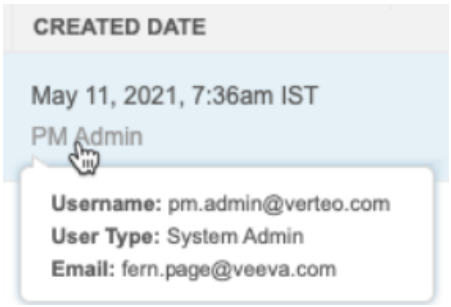
- **Name** - Click the column header to sort the layouts by name in ascending or descending order.

  Hover over the name for details about the object type and the data domains it belongs to.



- **Description**
- **Created Date** - Click the column header to sort the layouts by date.

  In the **Created Data** and **Modified Data** column, click the username to see the user type and email details for the user that changed the profile layout configuration.

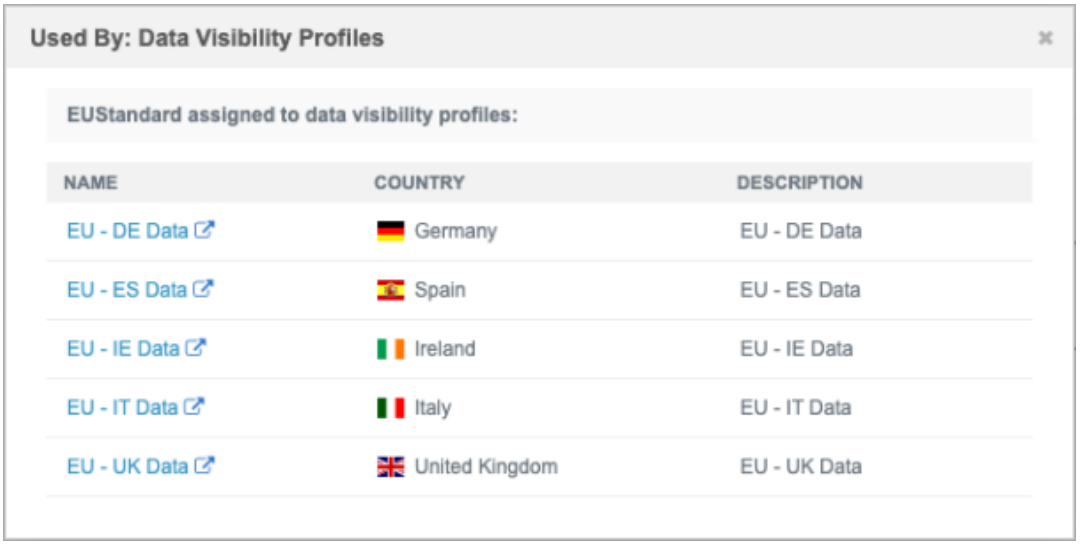


- **Modified Date** - Click the column header to sort the layouts by date.
- **Used By** - This column displays a count of the data visibility profiles and Network widgets that use the profile layout. Use this information to understand what features can be affected if you make changes to the layout.

  If the layout is being used, administrators can click the **Data Visibility Profile** or **Widget** link to see more details. Links do not display for Data Managers because data visibility profiles and Network widgets are managed by admin users only.

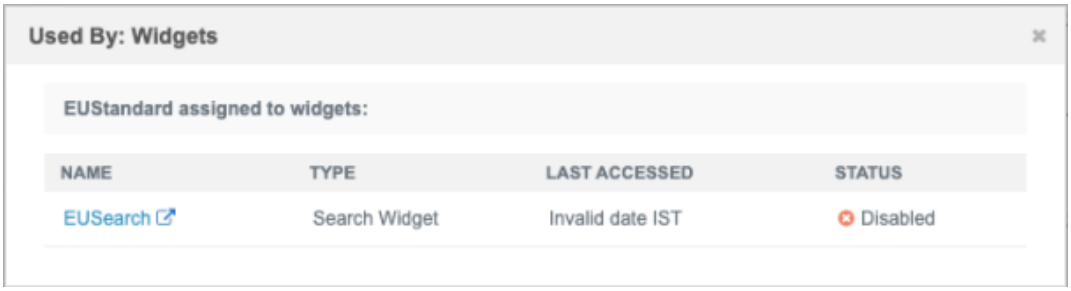
Data visibility profiles

Each data visibility profile is listed. Click the link to navigate to the data visibility profile configuration page.



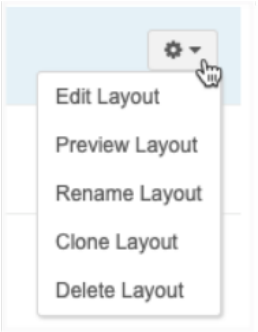
Network widgets

Details about each widget is listed. Click the link to navigate to the widget configuration page.



Profile layout actions

Use the **Options** icon to see the list of actions available for each layout. Standard layouts are read-only, so they have only a subset of the actions that custom layouts have.



Profile layout configurations

On each profile layout configuration page, the summary header includes more details about the creation date and user and the modified date and user. Hover over the username to display details about the user type and email address. You can also hover over the object icon for details about the object type and the data domains it belongs to.

A count of the data visibility profiles and Network widgets that use the layout also displays on the header. Administrators can click the **Data Visibility Profiles** or **Widgets** link to open a dialog for more details.

Source subscription

WIZARD MODE

21R2

The subscription wizard is enhanced to support complex denormalized feeds that contain multiple objects of different types and the relationships between them. Additionally, usability improvements have been made to simplify the object configuration process throughout the wizard steps.

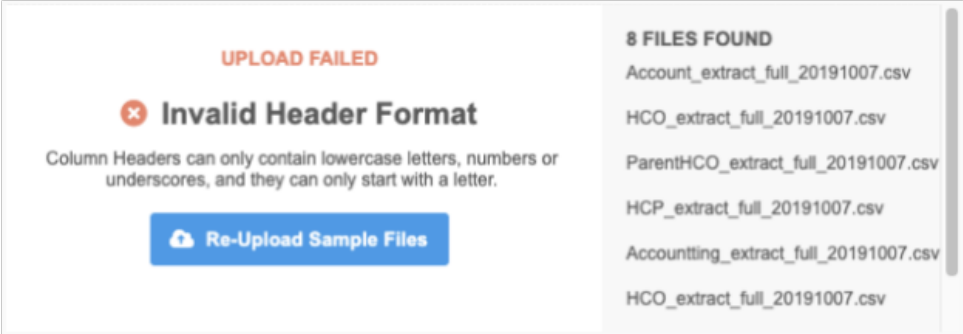
The following enhancements are included in this release:

- **File validation** - Errors occur if column headers include spaces or special characters.
- **Multiple object support** - Files can now contain up to 10 objects, all object types (main objects, sub-objects, and relationship objects), and multiple objects of the same type.
- **Custom keys** - Keys can now be defined in the wizard.
- **Field mappings** - Usability improvements have been made to simplify mapping.

These enhancements are enabled in your Network instance by default.

File validation

On the **Define Subscription** step, validation is added to files to check for spaces and special characters in columns. Subscriptions cannot be generated if columns have these issues. If these issues are found, an **Invalid Header Format** file error displays and the affected files display in the pane. Fix the columns and reload the files.



Multiple object support

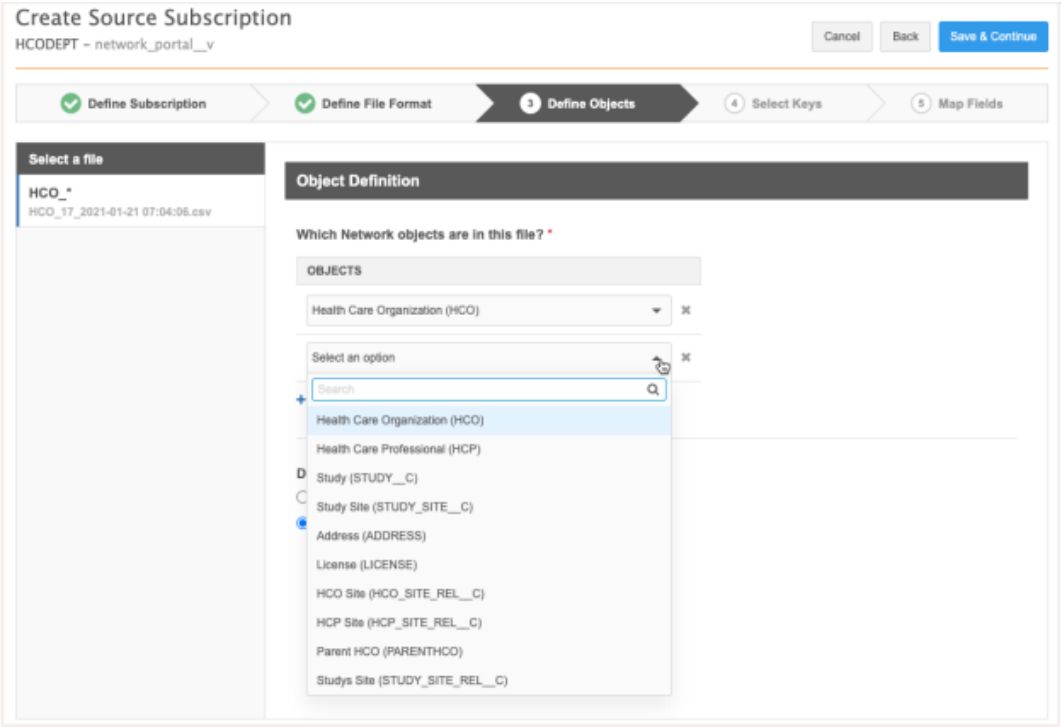
Some downstream systems generate denormalized files containing various objects, sub-objects, and relationships. Previously, the wizard configuration was limited to three objects for each file and relationship objects and sub-objects could not be in the same file. Also, only one object of each type could be in each file. Those limitations have been removed.

Each file can now include:

- Up to 10 objects in each file
- Any combination of main objects, sub-objects, and relationship objects
- Multiple objects of the same type

Validation has also been added to ensure that the subscription contains a main object.

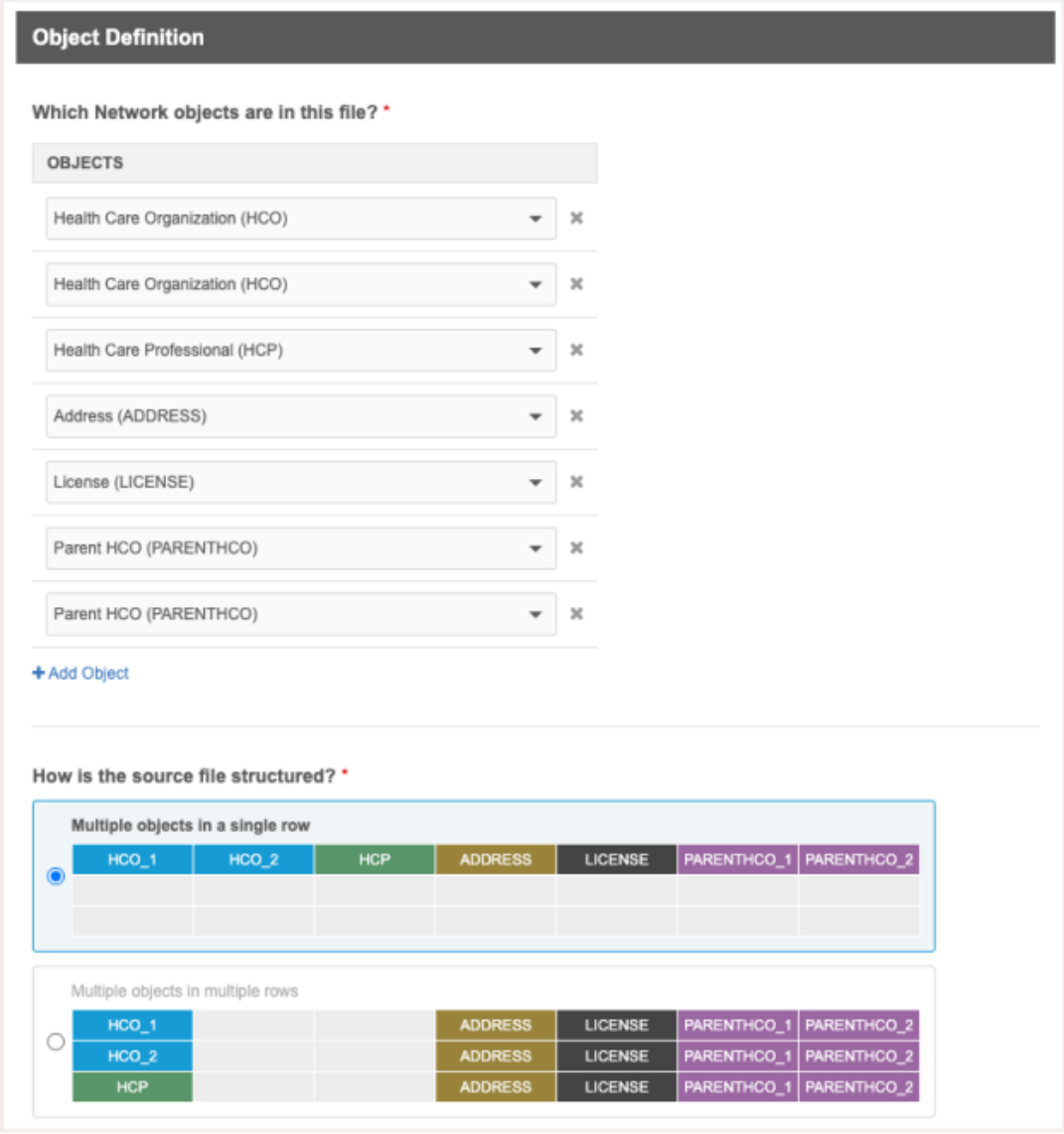
On Step 3 of the wizard, **Define Objects**, you can continue adding objects until you have reached the maximum of ten. When you add an object, all standard and custom objects that are enabled for your Network instance display in the list. If an object has already been added, it can be selected again.



Example

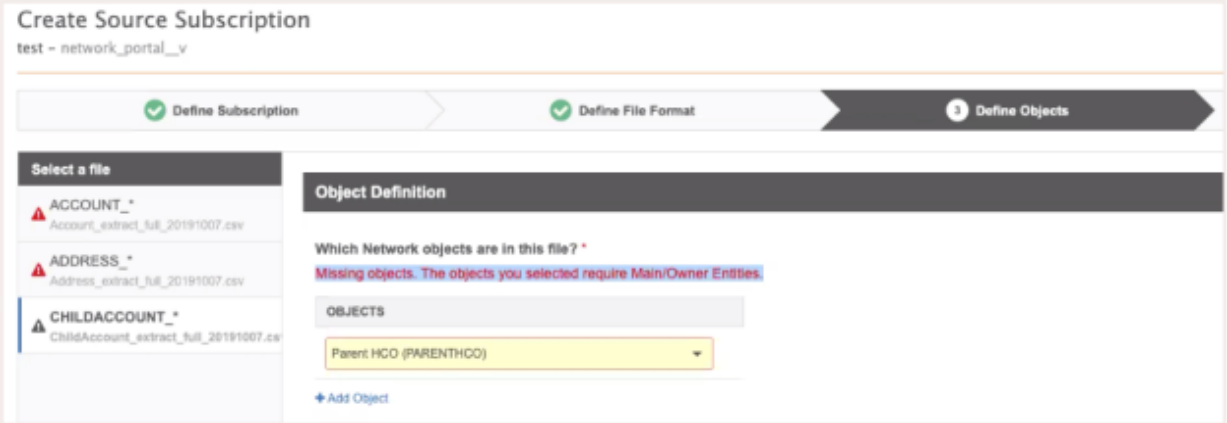
In denormalized files, all of the objects are in one line in the file so there could be multiple objects of the same type.

The source file structure tables display all of the objects that you identified for the file. Each object type is assigned a unique color. When there is more than one of each object type, an alias is created with an incremental number ; for example, `HCO_1`, `HCO_2`. This helps you to distinguish each object in the subsequent wizard steps.



Object owner validation

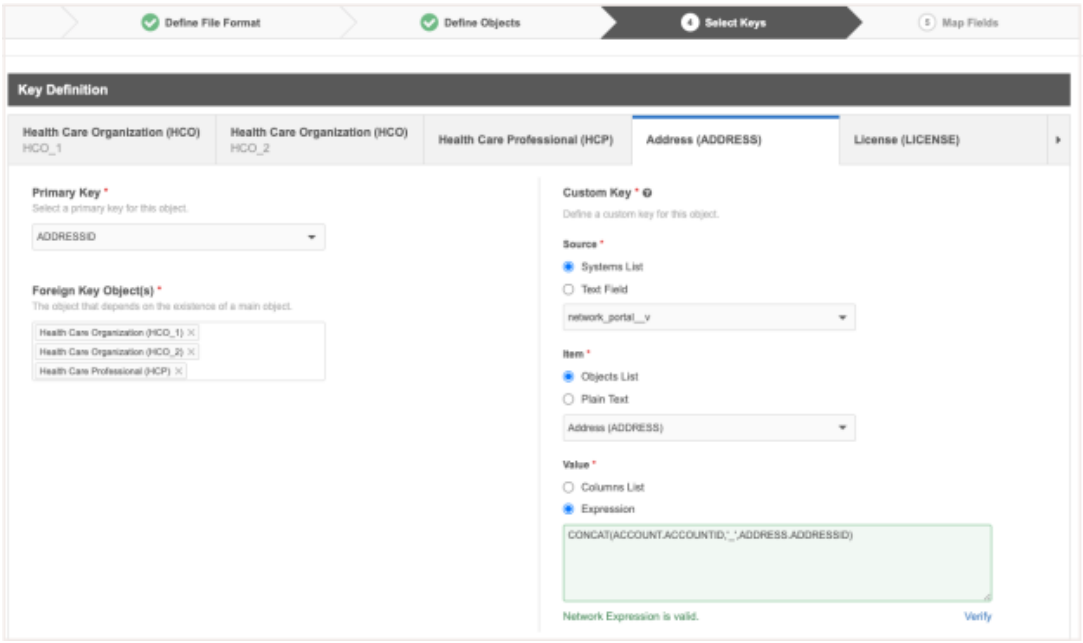
Validation is added to the **Define Objects** tab to ensure that the subscription includes a corresponding main/owner object for sub-objects and relationship objects. After you define the objects in each file and click **Save & Continue**, an error occurs if you haven't defined a main/owner object in one of the files. A main/owner object is always required.



Defining keys

The **Select Keys** step is redesigned to simplify the key configurations. Each object in the file now has its own tab. The tab name is the object name from the data model. If multiple objects of the same type are in this file, the alias displays below the object name so you can easily distinguish it. If there are more than five objects in the file, use the arrow to view more objects.

Depending on the object type, the tab contains the configuration for primary keys, foreign keys, and custom keys. A primary key is always required. Defining a foreign key owner and foreign key object depends on the objects in your file. The ability to define custom keys for each object is new in this release.



Custom keys

The wizard provides the ability to create custom keys so you have the flexibility to load specific sources. Previously, custom keys were automatically generated when the wizard configuration was saved and the subscription opened in Classic mode.

Custom keys must be unique for each object based on the system name, object, and external ID; for example, `SAP:HCP:47783849`.

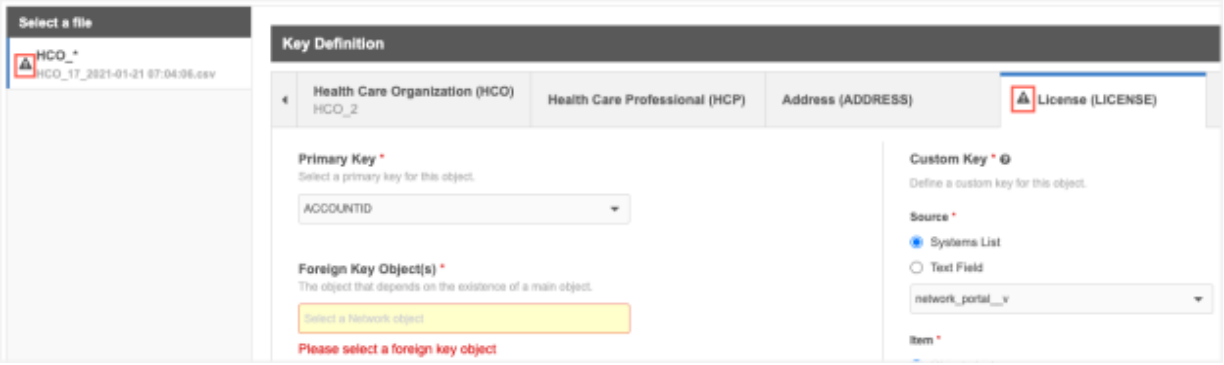
Use the three sections to define the custom key.

- **Source** - The source system for this subscription.
  - **Systems List** - This is selected by default and the value is the system that you selected for this subscription on the **Define Subscription** tab. Expand the list to choose any system that is defined in your Network instance.
  - **Plain Text**- Type a source. For example, for a CRM custom key, you might type *ACCOUNT*.
- **Item** - A value that can distinguish this key from other keys.
  - **Objects List** - This is selected by default because objects are typically used for the **Item** value. The value is the object of the current tab. Expand the list to choose any of the objects that you defined for this subscription.
  - **Plain Text** - Type a unique value.
- **Value** - Typically, the custom key value is an external ID.
  - **Columns List** - A list of the columns in the file. This is selected by default but no value is specified. Expand the list to choose any of the columns in this file.
  - **Expression** - Use a Network Expression to create the value. This works exactly how a NEX rule works in a custom field. The expression will be validated. The syntax is not validated here but is validated when the subscription runs.

Click through each object tab to define the keys for each object in the file.

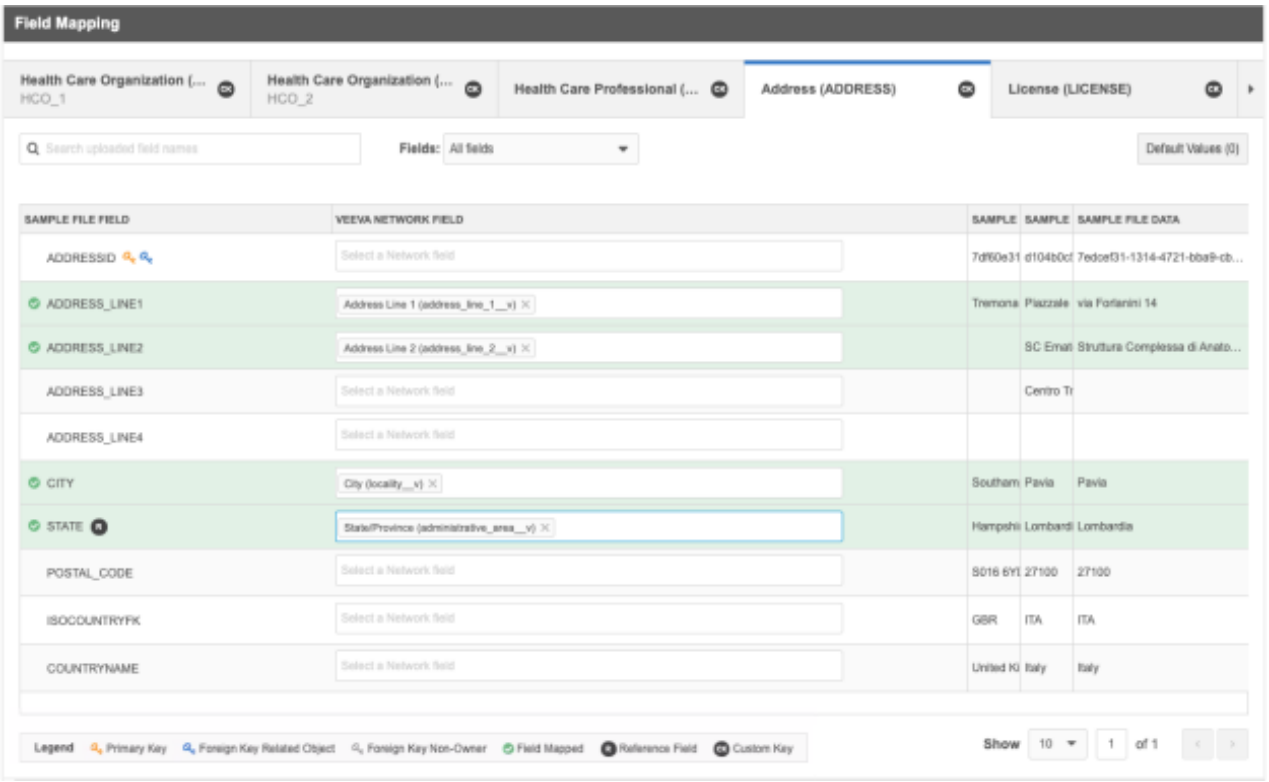
File validation

When you click **Save & Continue** from the **Select Keys** step, if any required values are missing on any of the object tabs, a **Warning** ⚠ icon displays on the file and each tab that is missing a value. The icon is cleared from each object tab after the required value is provided; it's cleared from the file when all required values are on each tab.



Map Fields

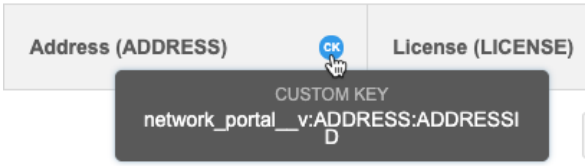
The **Field Mapping** wizard step is simplified to display a tab for each object in the file so administrators can focus on mapping fields for one object at a time. Previously, all objects were mapped together in the same table. Additionally, the fields in the **Veeva Network Field** column and in the **Define Default Values** dialog contain only the fields for that object for the countries you selected in step 1.



Click through each tab to map the fields for each object.

Custom key

The **CK** icon displays beside the object name on the tab. Click the icon to preview the custom key for the object. If a Network expression was configured, the preview includes the expression syntax.



Reference fields

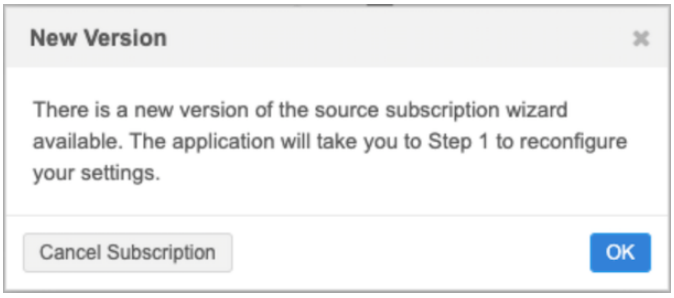
If you map a column to a reference type field, an **R** icon displays beside the column name. When you hover over the icon, a reminder to create reference aliases displays. Click the link in the message to navigate to the reference alias page for that system and reference type for the field mapped. If you load data with Network reference codes, aliases are not required.

Generate subscription

When you have finished configuring the subscription and click **Generate Subscription**, the subscription opens in Classic Mode so you can review the model map and field normalization, define match rules, and make any other changes. This is previous behavior that has not changed.

Draft subscriptions

Draft subscriptions that were created using the previous version of the wizard must be re-configured. If you open a draft, a message advises that Wizard Mode will open in Step 1 (**Define Subscription**) so you can configure the subscription settings using the updated wizard.



LOADING RELATIONSHIPS

21R1.1

Parent HCOs that are included in subscription feeds will be dropped or rejected if the related entity is not Valid or Under_Review. Occasionally, parent HCOs included in the feed have relationships to HCOs that have Invalid or Merged_Into record states. Now, to improve data integrity, these relationships will not be processed; the Parent HCO record will be dropped when the data is processed.

This enhancement is enabled by default. It applies to candidate records and opted-out records also.

Job warning

After the source subscription runs, if any Parent HCO records were not created, a job warning displays.

Example warning

```
A new PARENTHCO record was dropped from HCP <938061682273812525> due to
related entity <938061682274730046> being not valid.
```

Target subscriptions

EXPORTING DATA TO CLOUD STORAGE

21R2

Network now supports exporting data directly to your private cloud storage. In this release, exporting data from target subscriptions to Amazon's Simple Storage Service (Amazon S3™) is supported.

This feature is enabled in your Network instance by default.

Overview of tasks

To export data to cloud storage, the following tasks must be completed:

Amazon Web Services

- Create an Amazon S3 bucket.
- Create an IAM role.
- Set a policy for the Amazon S3 bucket and attach it to the IAM role.

Veeva Network

- Create an external credential for Amazon S3.
- Configure the target configuration to export to the Amazon S3 bucket.

Configure Amazon Web Services

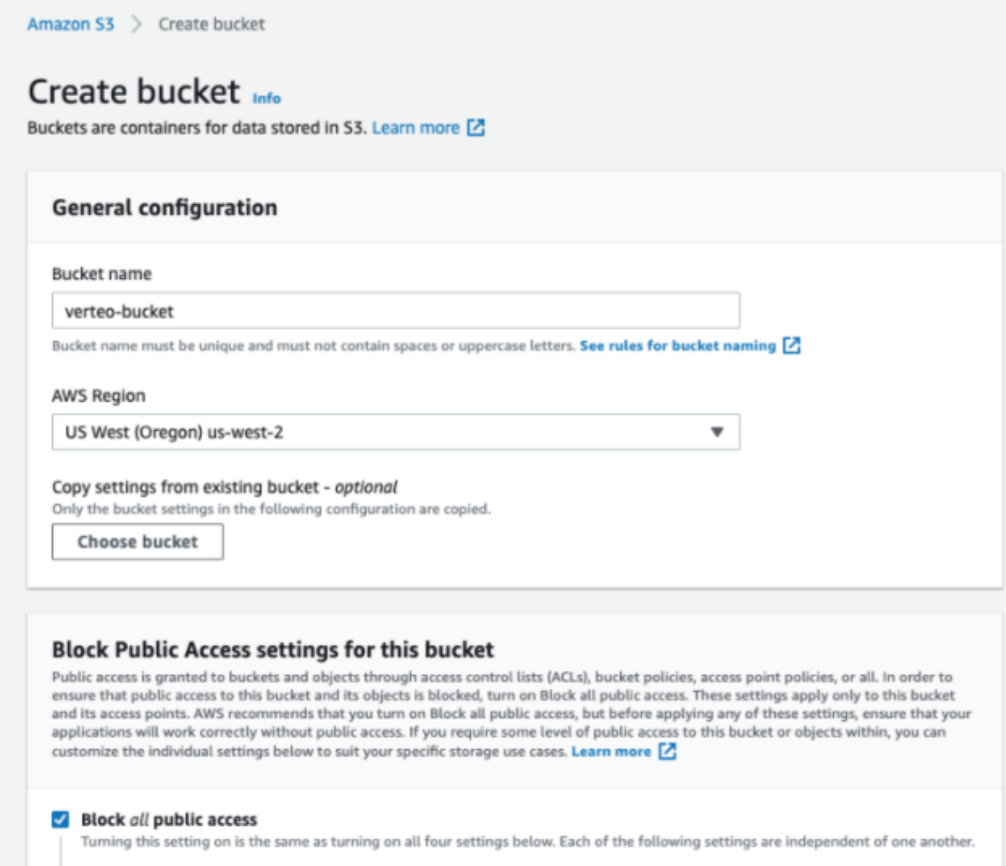
Create an Amazon S3 bucket and IAM role so you can export data directly from a target subscription.

For detailed information about these steps, see the *Amazon Simple Storage Service User Guide*: https://docs.aws.amazon.com/AmazonS3/latest/userguide/Welcome.html.

Complete the following steps in your AWS account:

1. Create an Amazon S3 bucket. This will be the target S3 bucket for Network to write to.

   On the Create bucket page, type a **Bucket name**, choose the **AWS Region,** and ensure that **Block all public access** is selected.



2. In the IAM Management Console, create an IAM Role. Network will use this to connect to the Amazon S3 bucket and load data.

   You can either copy the generated Trust Relationship Statement into the IAM role or use Amazon's IAM role setup.

   Example Generated Trust Relationship Statement

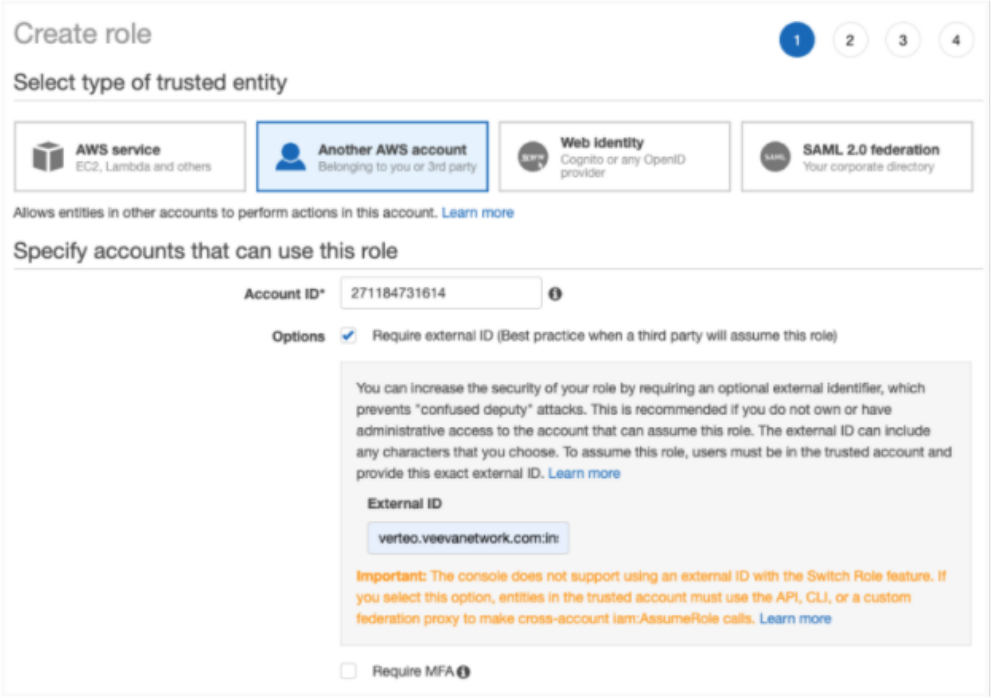
```
{
    "Effect": "Allow",
    "Principal": {
      "AWS": "arn:aws:iam::271184731614:root"
    },
    "Action": "sts:AssumeRole",
    "Condition": {
      "StringEquals": {
        "sts:ExternalId": "verteo.veevanetwork.com:instance_307"
      }
    }
 }
```

   If you use Amazon's IAM role setup, the following settings are required:

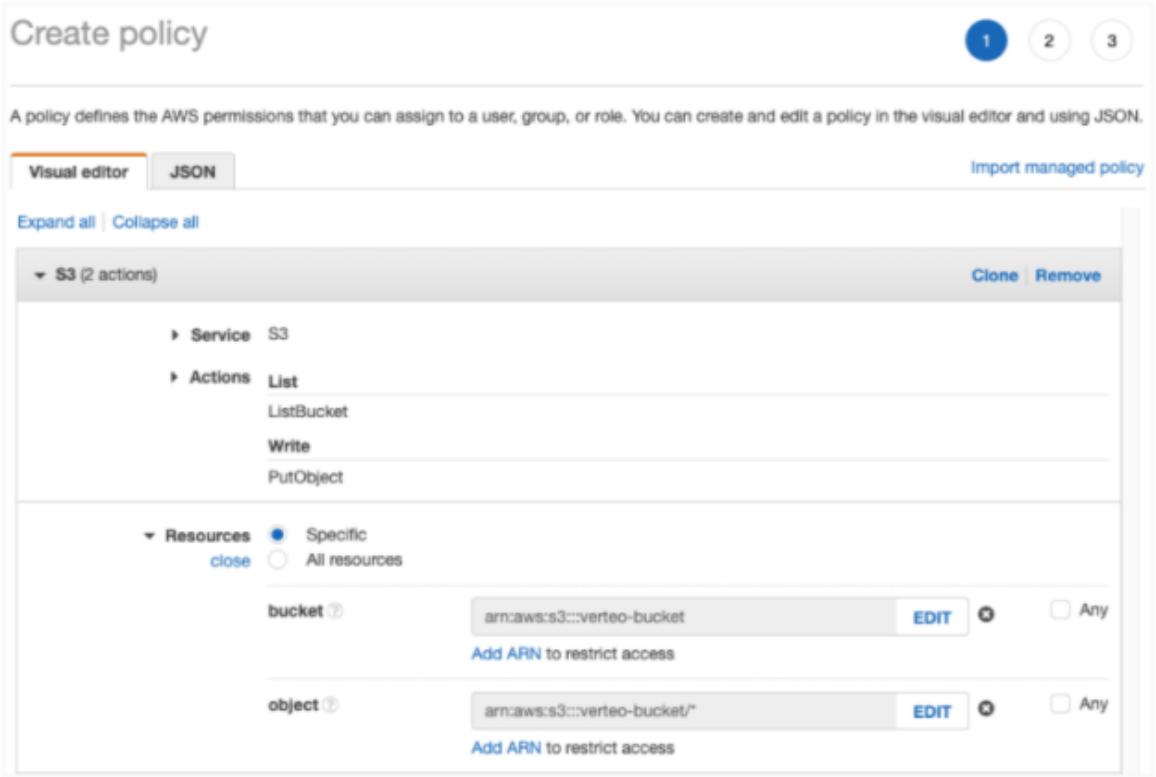
   - The **Trusted entity type** is **Another AWS account**.
   - The **Account ID** is 271184731614 (the Network AWS Account ID).

- The **External ID** is required by Network and is considered a best practice for third-party access. For example, `verteo.veevanetwork.com:instance_307`.

Note: The **External ID** varies for each Network instance. Refer to the **Generated Trust Relationship Statement** for the information in your Network instance.



3. In the IAM Management Console, create a policy for the Amazon S3 bucket. This is used by the IAM role to load data to the Amazon S3 bucket.



The AWS permissions must enable the following actions:

- **List** - ListBucket
- **Write** - PutObject

In the **Resources** section, define the Amazon Resource Name (ARN) for the bucket and object.

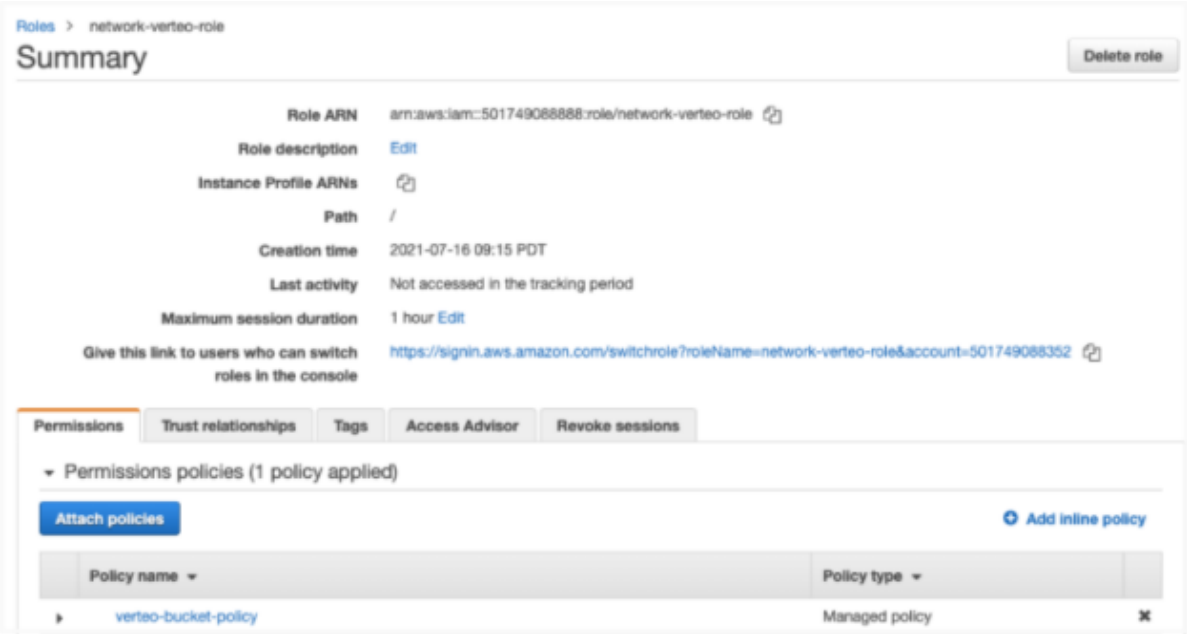
The ARN format uses the following naming convention:

```
arn:aws:s3:::<S3 bucket name>
```

Example policy

```
{
     "Version": "2020-09-01",
     "Statement": [
         {
             "Effect": "Allow",
             "Action": [
                 "s3:PutObject",
                 "s3:ListBucket"
             ],
             "Resource": [
                 "arn:aws:s3:::verteo-bucket/*",
                 "arn:aws:s3:::verteo-bucket"
             ]
         }
     ]
 }
```

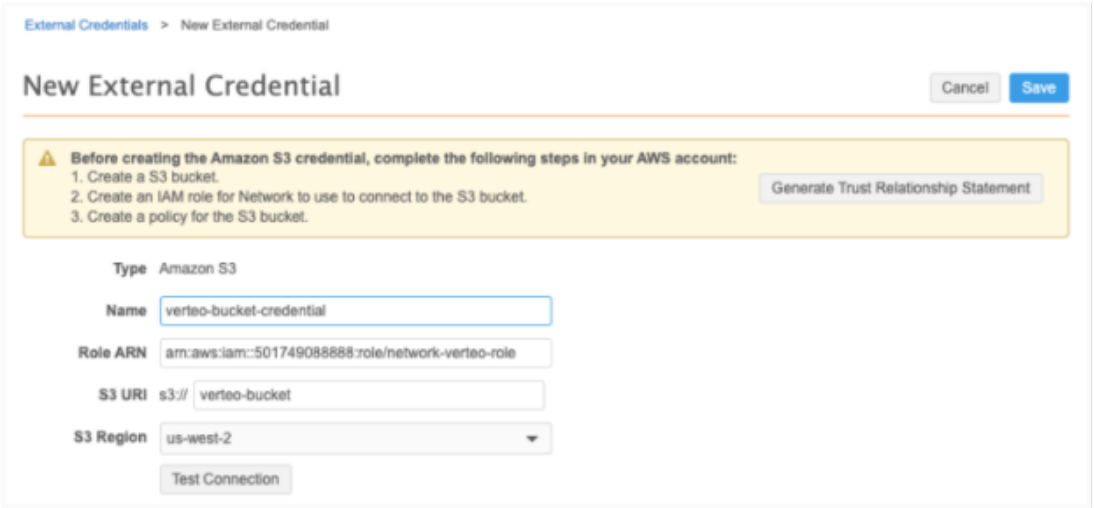
4. In the IAM Management Console, attach the new policy to the IAM role that you created.



Create an Amazon S3 credential

Create the credential in your Network instance so you can connect to your Amazon S3 bucket.

1. In the Admin console, click **Settings > External Credentials**.
2. Click **Add Credentials**.
3. On the **New External Credential** dialog, choose **Amazon S3** from the list.
4. Click **Continue**.



5. On the New External Credential page, if you haven't already set up your IAM role, click **Generate Trust Relationship Statement** to get the JSON for the IAM Role trust relationship.

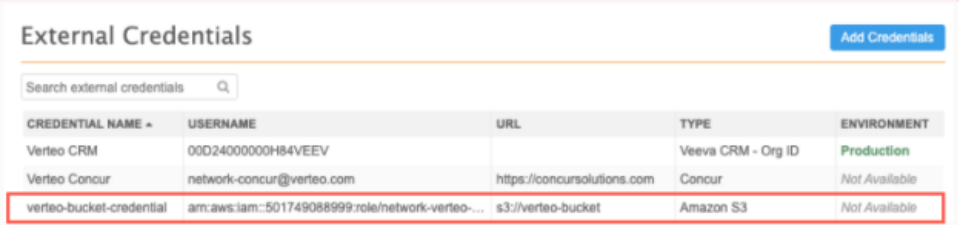
   Provide the following information for the S3 credential:

6. In the **Name** field, type a name for the credential.
7. In the **Role ARN** field, type the Amazon Resource Name for the IAM Role.
8. Type the **S3 URI**. The `s3://` prefix is added to the URI by default. If you have folders in your bucket, specify the folders in the path.
9. Expand the **S3 Region** list to select the AWS region where the S3 bucket is located; for example, `us-west-2`.

   To review the list of regions, see the *AWS General Reference Guide*: https://docs.aws.amazon.com/general/latest/gr/rande.html#s3_region.

10. Click **Test Connection**. Network validates the credentials and ensures that the S3 bucket exists.
11. **Save** your changes.

The Amazon S3 credential is complete. It is now added to the list on the External Credentials page.



Export files to cloud storage

Configure a target subscriptions to export files directly to an Amazon S3 bucket.

To configure the subscription:

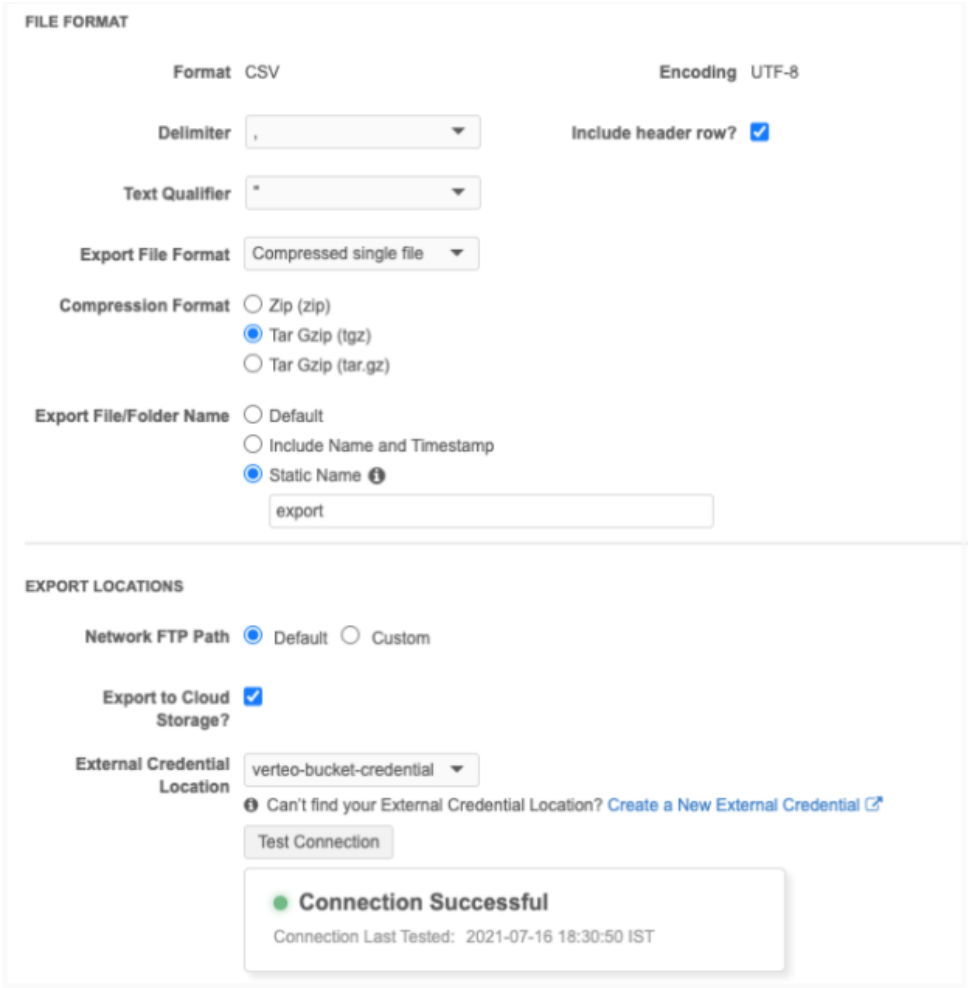
1. Create a target subscription or open an existing subscription (**System Interfaces > Target Subscriptions**).
2. In the **General Export Options** section, define the settings in the **File Format** section as usual.
3. In the **Export Locations** section, select **Export to Cloud Storage**.

   The **Network FTP Path** remains selected because a copy is always exported there also.

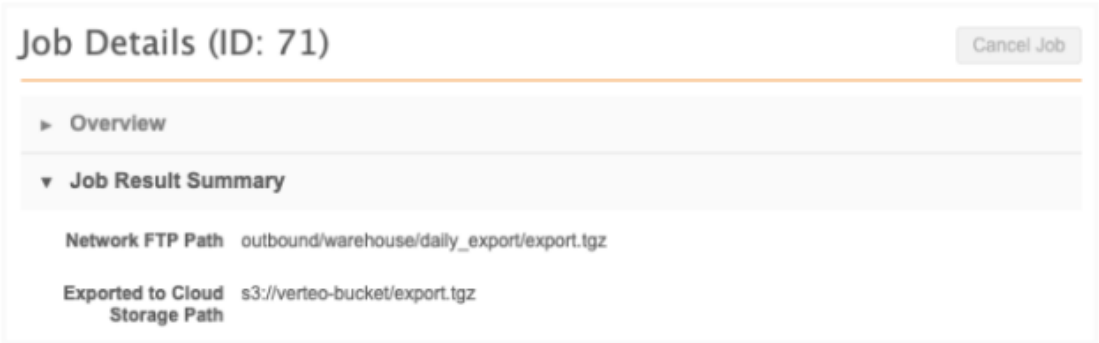
4. The **External Credential Location** setting displays. Expand the list and choose your Amazon S3 credential.

   Click **Test Connection** to validate that credential is correct.

5. **Save** your changes.



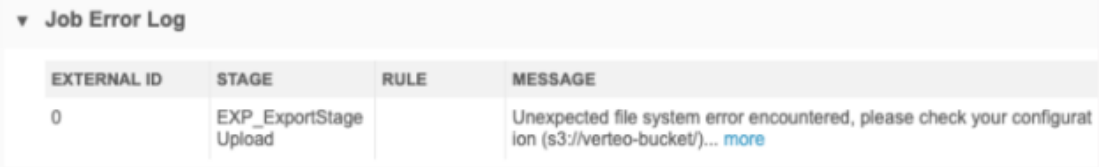
After you run the source subscription, the Job Details page includes the export path in the **Job Result Summary** section.



Export errors

If there was a problem exporting to the cloud storage, the following error will be reported in the **Job Error Log** on the Job Details page:

```
Unexpected file system error encountered, please check your configuration
<external credential>. If the problem persists contact your Veeva Network
administrators."
```



Exported files

The subscription files will be exported to your Amazon S3 bucket using the following path format: <*S3 URI*>/<*export folder*>.

Example

These example paths are based on the following settings:

- **External Credential Location** (S3 URI) - `s3://verteo-bucket`
- **Compression format** - **Zip**
- **Export File/Folder Name** - **Default**. For example, `exp_000000A3.zip`.

Compression Format	Cloud Storage Path
Compressed single file	s3://verteo-bucket/exp_000000A3.zip
Compressed individual files	s3://verteo-bucket/exp_000000A3/hcp.zip s3://verteo-bucket/exp_000000A3/hco.zip s3://verteo-bucket/exp_000000A3/address.zip
Uncompressed	s3://verteo-bucket/exp_000000A3/hcp.csv s3://verteo-bucket/exp_000000A3/hco.csv s3://verteo-bucket/exp_000000A3/address.csv

The folders are created in the Amazon S3 bucket when the files are exported.

Configuration management

When you include a target subscription in an export package, the Amazon S3 credentials are not migrated to the target environment. The **Export to Cloud Storage** option in the target subscription configuration is also disabled in the target environment.

Match

FORMATTED NAME FIELD

21R1.1

The `formatted_name__v` field for HCPs is now available to add to data groups and match rules in match configurations. Previously, the field could be used but only in advanced mode. Now, you can select the field from the lists in the Match Configuration UI.

If the field is empty in the incoming data, it cannot be added to data groups. The default rules to populate the field typically take affect after the match process completes.

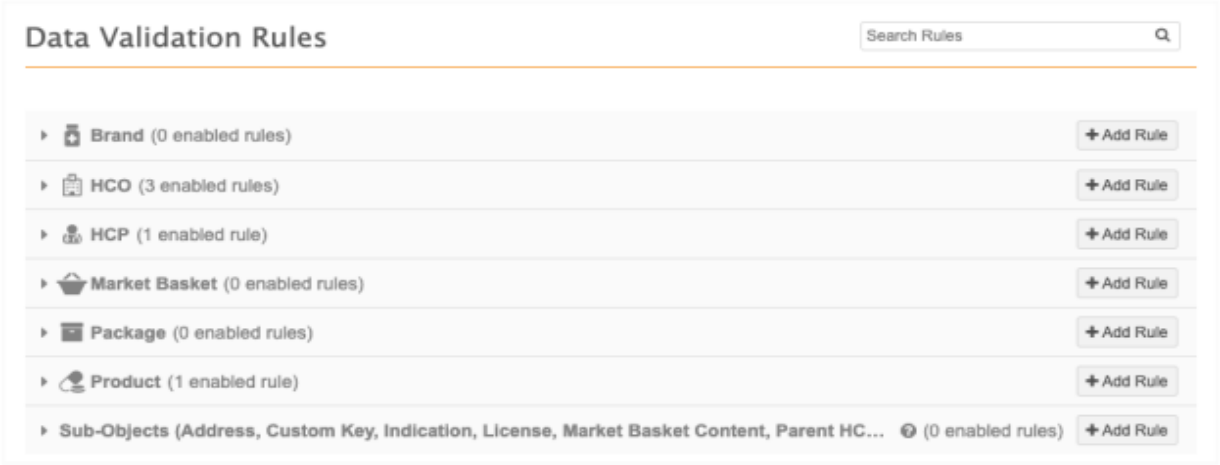
This enhancement is enabled by default in your Network instance.

Data validation rules

CUSTOM OBJECT SUPPORT

21R1.1

Data validation rules can now be added for custom main objects, sub-objects, and relationship objects . Previously, data validation rules supported Veeva standard objects, sub-objects, and relationship objects only.



This enhancement is enabled in your Network instance by default.

When custom main objects and sub-objects are enabled in your Network instance, they will automatically display in the list on the Data Validation Rules page; data does not have to be loaded into the object before they display. Rules are not automatically created for new custom objects; they must be defined.

For details about adding rules, see Create a data validation rule in the *Veeva Network Online Help*.

Deleting objects

When custom objects are deleted, data validation rules for the object are not automatically deleted. Ensure that data validation rules for deleted objects are disabled.

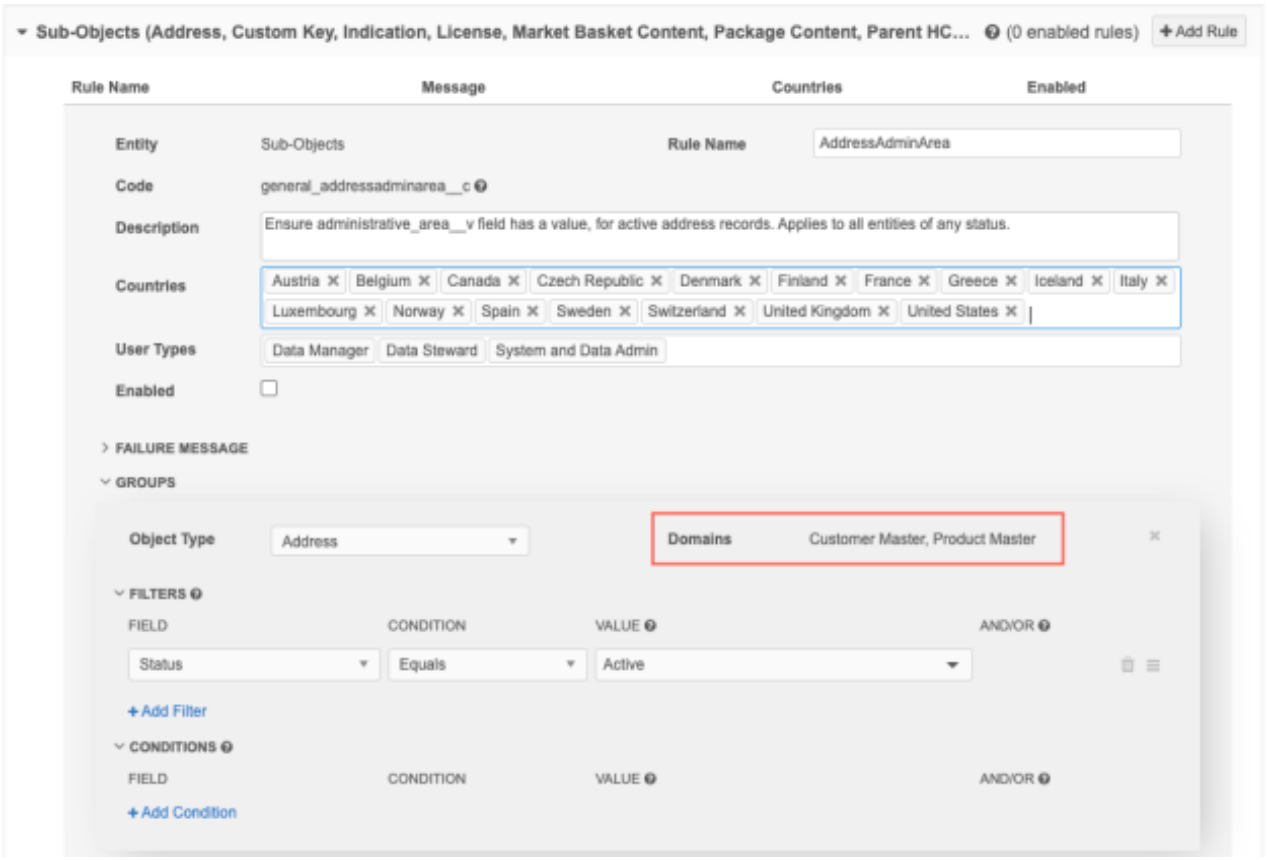
Sub-objects

Rules created for sub-objects and relationship objects apply to all related records, so if you add a new custom object that uses an existing sub-object, the existing rules will apply to those custom object records too. For example, if you add a Payer custom object and it uses the Address sub-object, all existing data validation rules for addresses will also apply to the Payer records.

Only enabled sub-objects and relationship objects will display in the **Sub-Objects** section on the Data Validation Rules page.

Data domains

Each rule now lists the data domains of the sub-object or relationship object. This information is useful to understand what main objects the sub-object or relationship object is associated with.



OPERAND SUPPORT FOR FIELD SETS

21R1.1

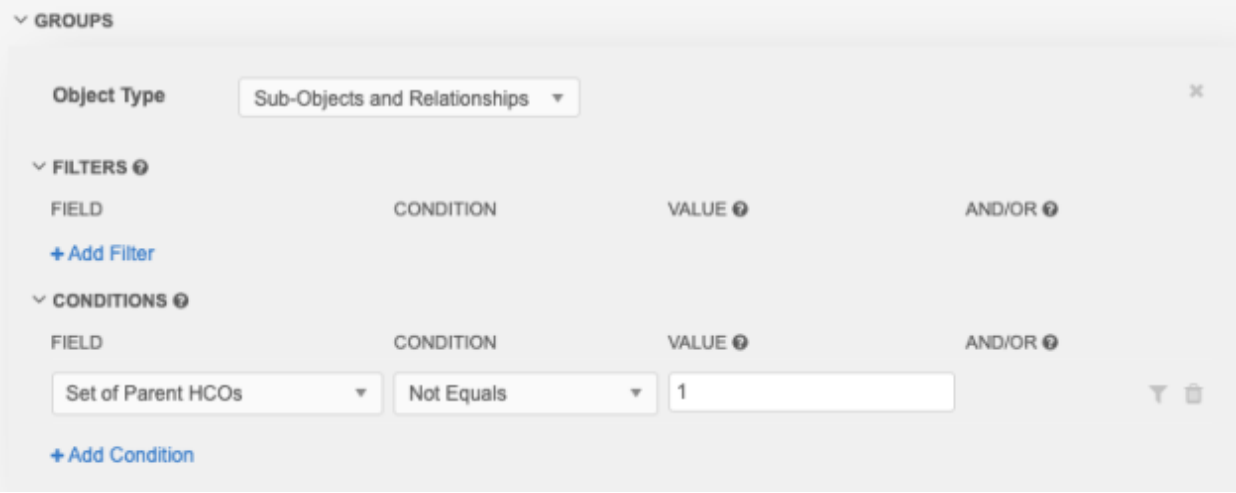
Some operands have been extended to support field sets (for example, `set_of_addresses__v`). The operands can be used to create rules to check for a specific count of sub-objects and relationship objects. Previously, you could check for duplicate or missing sub-objects. Now you can use the operands to check for a specific count of objects, or to check for character counts (for example, you can create a rule that names must be less than 10 characters).

The following operands support field sets:

- Equals
- Not Equals
- Less Than
- Greater Than
- Between

Example

Create a data validation rule to ensure that records have only one Parent HCO. Use the **Not Equals** operand to fail the rule for any entity that has more than one Parent HCO.



Field sets are supported for any main object. For example, when you create a rule for HCPs, you can choose a set of fields for any sub-object.

DATA VALIDATION RULES PAGE

21R1.1

The list on the Data Validation Rules page is updated to help you easily view the supported objects and their existing data validation rules.

The following updates have been made:

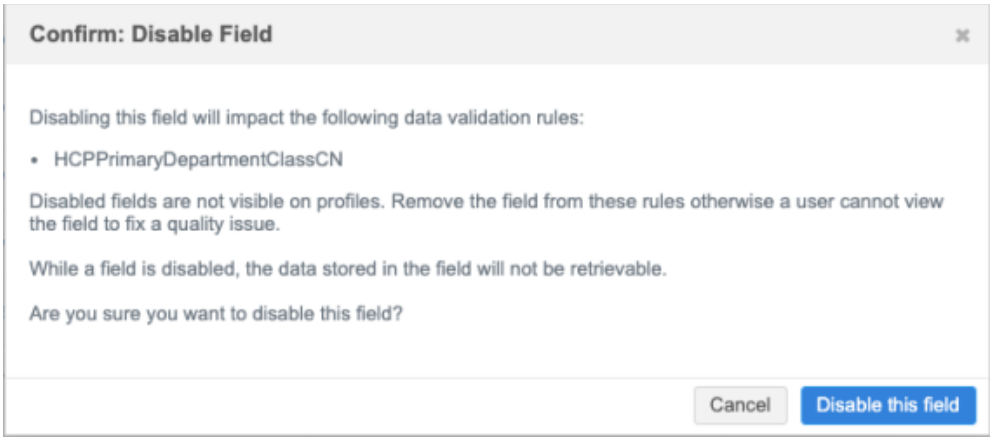
- **All object sections** - All sections are collapsed by default so you can easily browse the page. Previously, each section was expanded by default.
- **Main objects** - These sections now contain the object icon and a count of the enabled rules. Expand the object to view the rules.
- **Sub-Objects**- This section lists all enabled sub-objects and relationship objects in your Network instance. A count of the enabled rules for all listed objects displays.

DISABLING FIELDS

21R1.1

When you disable a data model field, the confirmation message now lists the impacted data validation rules so you remember to remove the field from the rule.

Disabled fields are not automatically removed from data validation rules. If a disabled data model field is included in a data validation rule, the rule can still trigger but the field is no longer accessible in the Network UI. This means that Data Stewards cannot resolve the rule violation and continue processing a record change. Including this information in the confirmation message reminds administrators to update the data validation rule.



PROFILE PAGE ENHANCEMENTS

21R1.1

When data validation rules are triggered on record profiles, they display in the right pane above the preview boxes. The pane now remains in place when you scroll through the profile page. This is helpful when Data Stewards are resolving validation issues because the message remains in view as they scroll. This also means that the preview boxes are always in view on the profile for all users as they scroll the page.

Data model

NEW COUNTRIES SUPPORTED

21R2.0

OpenData data models have been added for countries in the following regions.

Asia Pacific

A data model has been added for South Korea (KR).

The data model is based on the Other Countries (ZZ) data model. The activated reference codes for South Korea are based on the reference codes that are activated for Other Countries (ZZ).

Localization

English (en) translations will be used for the Network UI and data model fields. Australian-English (en-AU) translations will be used for reference data.

Europe

A data model has been added for Albania (AL).

The data model is based on the Other Countries (ZZ) data model. The data model also includes additional fields so it is consistent with the EU OpenData data model.

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

Localization

English translations will be used for the Network UI, data model fields, and reference data.

Latin America

A data model has been added for each of the following countries:

- Ecuador (EC)
- Peru (PC)

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

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

Localization

Spanish (es) translations will be used for the Network UI and data model fields. Spanish-Mexico (es-MX) translations will be used for reference data.

View country data models

To view the data model for Albania, Ecuador, or Peru:

1. In the Admin console, click **Data Model** and choose the **Customer Master** data domain.
2. Select an object.
3. In the **Fields** section, expand the **Country** list and choose the country.
4. Repeat for the other objects.

Alternatively, click **Export Data Model** and filter the downloaded file to review the fields enabled for Albania, Ecuador, Peru, or South Korea.

DATA PRIVACY OPT OUT

21R2

Veeva OpenData now manages HCP opt outs in the following countries:

- Albania (AL)
- Australia (AU)
- Singapore (SG)

Two data model fields have been enabled for these countries for the HCP object:

- `data_privacy_opt_out__v`
- `data_privacy_opt_out_date__v`

Records that are opted-out by Veeva OpenData do not display and cannot be accessed in downstream systems. This ensures data privacy for opted-out HCPs to satisfy regional regulatory requirements.

Opted-out countries

To review the list of opted-out countries, in the Admin console:

1. Click **Data Model > Data Domains** and choose the **Customer Master** domain.
2. Select the **Health Care Professional** object and find the `data_privacy_opt_out__v` field in the **Fields** section.
3. Click the field to review the list of opted-out countries that are managed by Veeva OpenData.

DATA PRIVACY OPT OUT DATE

21R2

The **Customer Data Privacy Opt Out Date** field will become read-only in Network version 21R3.0. The field was introduced in version 20R3.1 to capture the date that the data privacy opt out flag is set to **True**. The field has been editable so administrators could backfill the date on locally managed HCPs records that were opted out before the field existed.

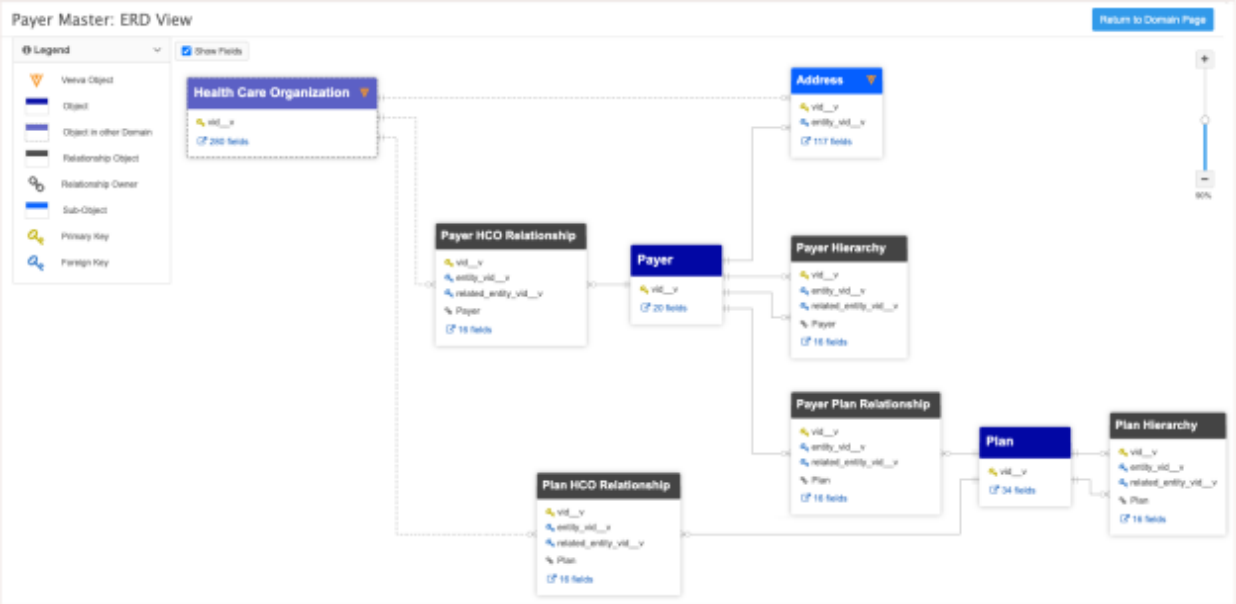
If you are planning to backfill the **Customer Data Privacy Opt Out Date** field, the updates must be completed before version 21R3.0. For detailed instructions, see the Data privacy opt out date topic in the *Veeva Network Online Help*.

This update will be enabled by default in your Network instance in version 21R3.0.

ERD VIEW

21R2

The ERD view in the data model is updated with increased font sizes, tooltips that do not scale, and scale percentages on the zoom control.



These updates are enabled in your Network instance by default.

Font size

The font size of the object names on the nodes is increased so they are more readable when you zoom out on the ERD view. The font size for main objects is slightly bigger than the font size for sub-objects and relationship objects so main objects are easily identifiable.

Tooltips

If your data model is large, the object names can become unreadable if you are zoomed out to view all of the nodes. Tooltips now remain the same size as you zoom in and out of the view.

Zoom control

The zoom control now displays the percentage of the scale that is currently applied to the ERD view. The maximum zoom available is 150 percent. The minimum zoom available is 30 percent.

FORMATTED NAME

21R2

A custom calculation has been added for the `formatted_name__v` field for Singapore. The formatted name uses values from several name fields to display a complete name for an HCP.

This enhancement is enabled by default in your Network instance.

Name calculation

HCP names for Singapore are calculated using these Veeva fields in the following order:

```
prefix__v + first_name__v + middle_name__v + nickname__v + last_name__v
```

Example

Prefix	First Name	Middle Name	Nickname	Last Name
Ms.	Kaelyn	Jean		Tan

The formatted name displays on the profile page.

Note: The formatted name is translated using English - Australian (en_AU) for Singapore.

Network integrations

NETWORK BRIDGE MIGRATION

21R2

Network instances that use the CRM Data Subscription will be migrated to the Network Bridge by October 1, 2021. The Veeva Network team will contact customers to help with the migration. To initiate the migration process now, contact Veeva Support.

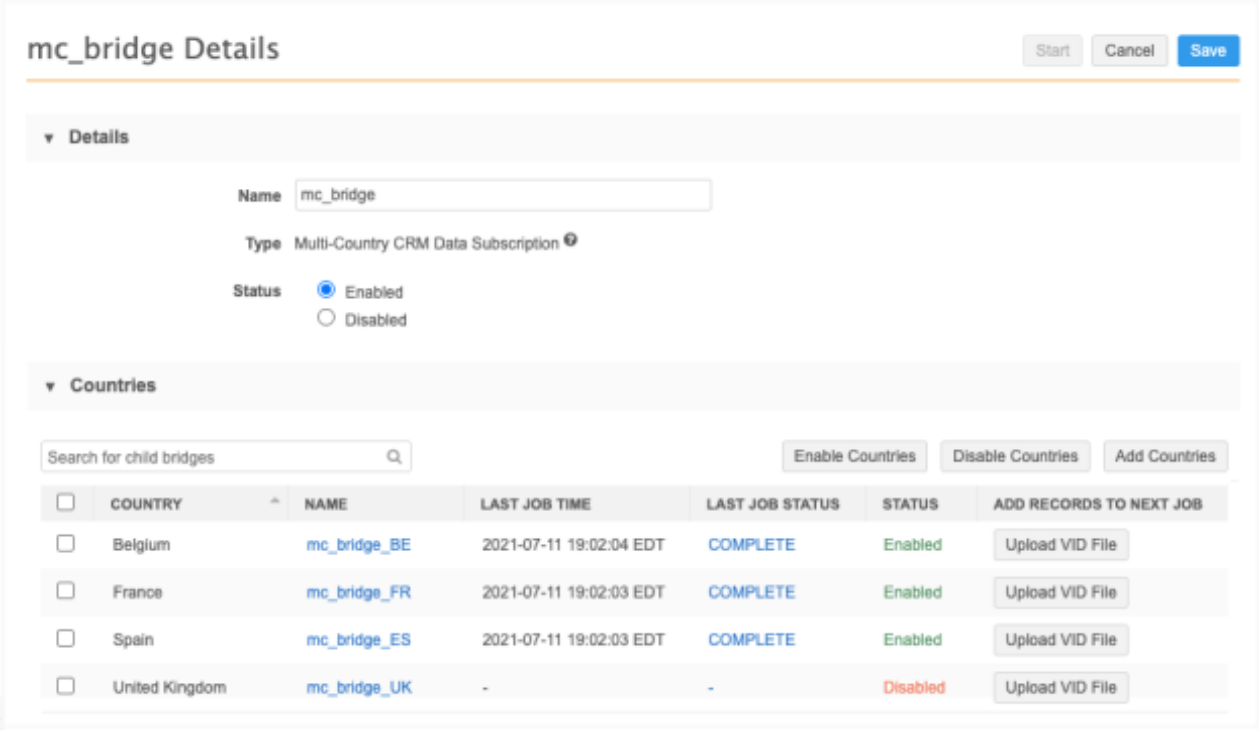
The Network Bridge has been in production for early adopters since version 18R1.0. The migration process has been available to do (through a Veeva Support ticket) since Network version 20R2.1.

For more information, see the Network Bridge migration process topic in the *Veeva Network Online Help*.

NETWORK BRIDGE MULTIPLE COUNTRY SUPPORT

21R2

Administrators can now configure a Network Bridge to manage and maintain the CRM data subscription process for multiple countries. Previously, a Network Bridge and target subscription was configured for each country which could be time-consuming and difficult to maintain for global customers. Now, you can create a single Network Bridge and apply the configuration and target subscription to many countries.



This enhancement is enabled by default in your Network instance.

About multi-country bridges

A multi-country bridge is a single bridge that is applied to several countries. Each country is considered to be a read-only child bridge. When the bridge runs, the target subscription runs individual jobs for each country in parallel so if one job fails, the other jobs will continue.

When you create a multi-country bridge, all of the settings are applied to the child bridges:

- Name

  The naming convention is <*multi-country bridge name*>_<*country_code*>. For example, if France (FR) is added to the `mc_bridge` multi-country bridge, the child bridge name is `mc_bridge_FR`.

- Target subscription
- Primary country (filter in the target subscription)
- Network Integration user
- External credential
- Revision data value (optional)
- Enhanced inactive record sync (optional)
- Job schedule
- Job triggers

Configure the target subscription

Before you create the multi-country Network bridge, define the target subscription configuration that you'll use for the bridge. There are a few recommended settings for target subscriptions that are used for multi-country bridges.

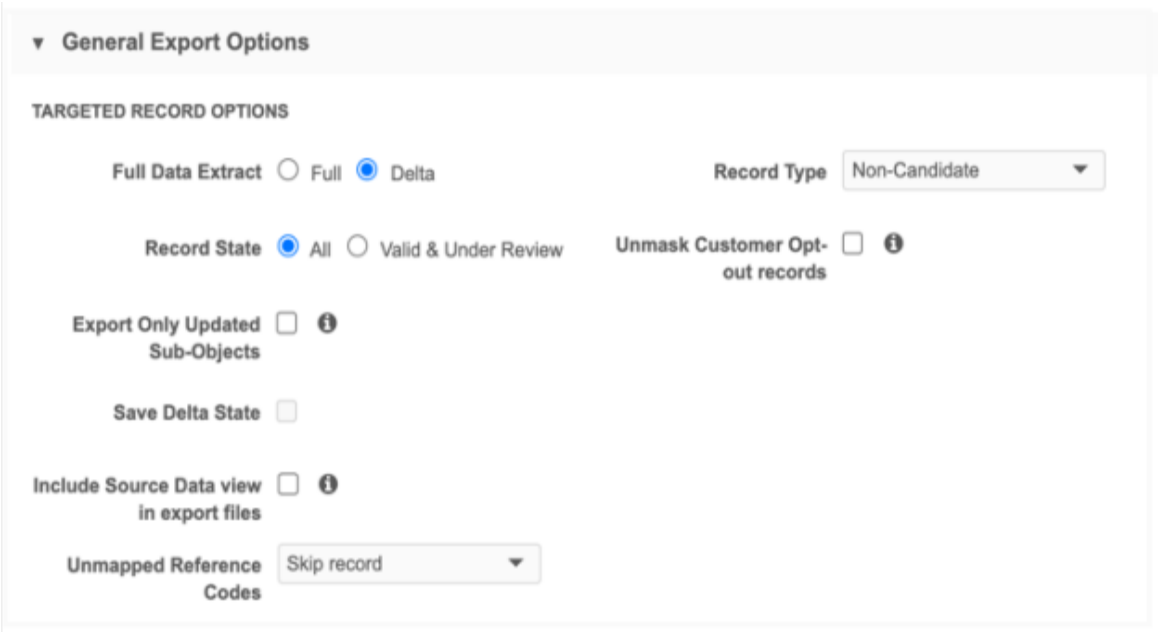
To add a subscription:

1. In the Admin console, click **System Interfaces > Target Subscriptions**.
2. Click **Add Subscription**.
3. In the Details section, define the following settings:
   - **Name** - Type a relevant name for the subscription.
   - **Type** - Choose Data.
   - **System** - Expand the list and choose the Veeva CRM org that you will export the data to.

     If you haven't defined a system for the CRM org yet, go to **System Interfaces > Systems** and create the system.

   - **Description** - Type a meaningful description for this subscription so it is clear that is used for a multi-country Network Bridge.
4. In the **General Export** section, ensure that the following settings are defined:
   - **Full Data Extract** - Choose **Delta**.
   - **Record Type** - Choose **Non-Candidate**.
   - **Record State** - Choose **All**.
   - **Export Only Updated Sub-Objects** - Do not select this setting.

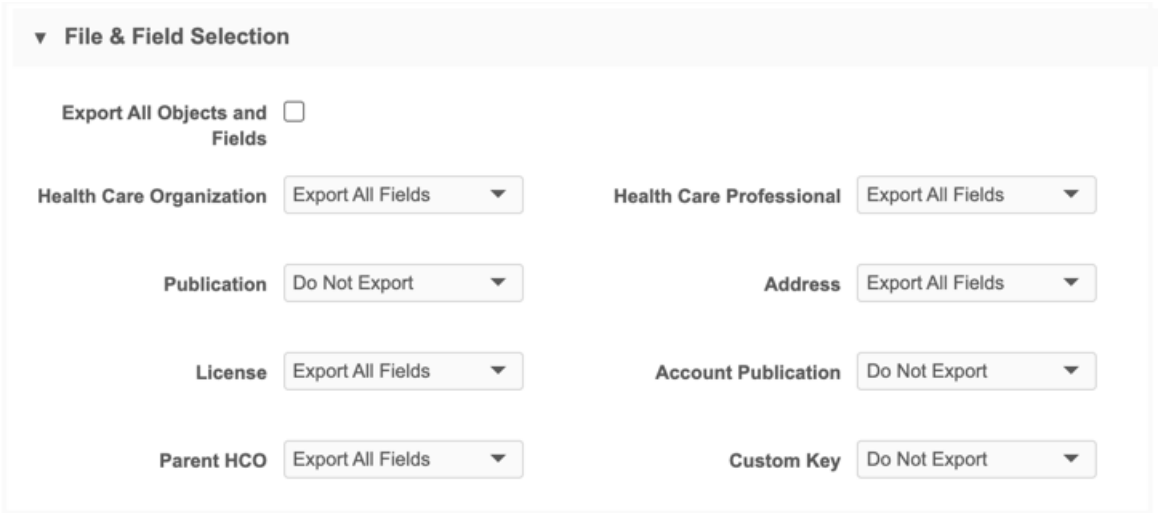
Tip: These settings are recommended for target subscriptions for Single-Country and Multi-Country Network Bridges.



Accept the defaults for the remaining settings in the **General Export Options** sections.

Important: In the **File Format** section, do not change the default values. Veeva CRM expects target subscriptions to be comma delimited and to have a header row.

5. In the **File & Field Selection** section, all the enabled objects in your Network instance display. Accept the **Export All Fields** default value for all the Veeva standard objects. Choose **Do Not Export** for **Custom Key** and all custom objects.

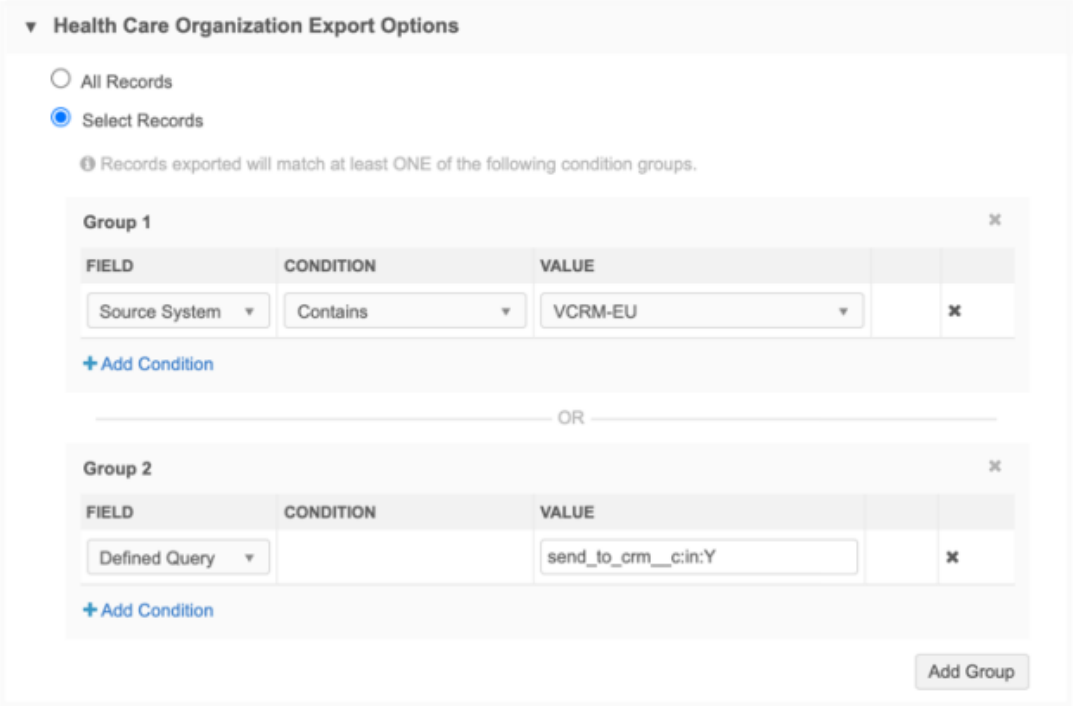


6. In the **Export Options** sections for HCOs and HCPs, a target subscription for a single-country Network Bridge typically has a Primary Country filter defined. This isn't needed for a multi-country Network Bridge because a country filter is automatically applied when the bridge job for each country runs.

   A target subscription for a multi-country bridge will typically have the following filter groups defined for HCO and HCPs:

   - **Group 1**
     - **Field** - Source System
     - **Condition** - Contains
     - **Value** - The system for the CRM org.
   - **Group 2**
     - **Field** - Defined Query
     - **Value**: send_to_crm__c:in:Y

       This query means that the record will be exported if the send to CRM flag is set to Y.



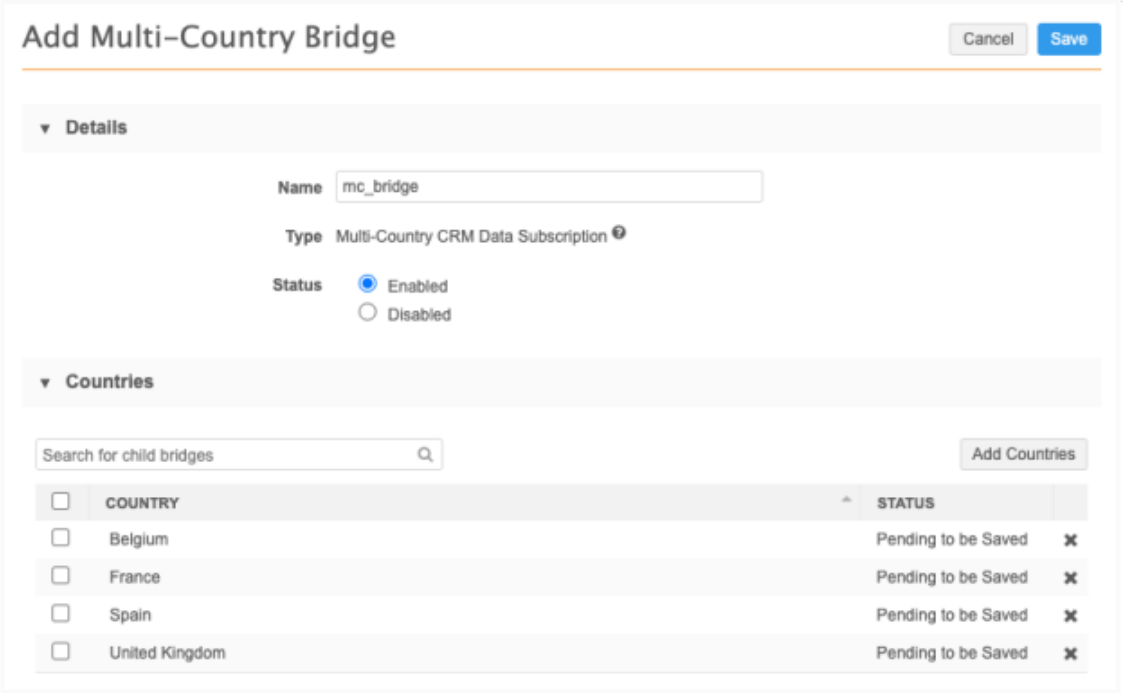
7. In the Job Trigger Configuration section, accept the **Manual** option to run the subscription. The schedule for the subscription will be set in the Network Bridge configuration.
8. **Save** your changes.

The target subscription is available and can be applied when you create the multi-country Network Bridge.

Create a multi-country Network Bridge

To create a bridge:

1. In the Admin console, click **System Interfaces > Network Bridge**.
2. On the Network Bridge page, click **Add Bridge** and choose **Multi-Country Bridge**.
3. In the **Details** section, define the following settings:
   - **Name** - Type a relevant name for this bridge.
   - **Type** - **Multi-Country CRM Data Subscription** is defined by default.
   - **Status** - The bridge is enabled by default.
4. In the **Countries** section, click **Add Countries** and select all of the countries that should be included in this multi-country bridge subscription. Use the search field to quickly find the countries to add. You can search by country name or country code; for example, *France* or *FR*.

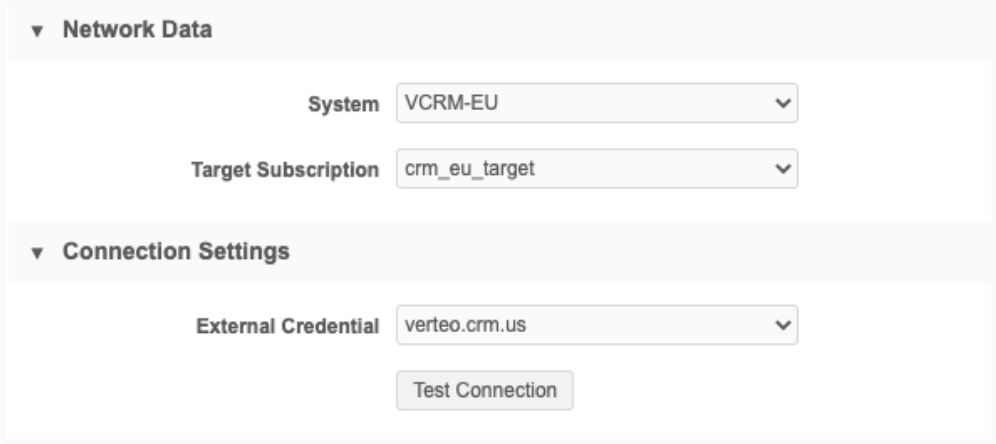


The countries are added to the configuration, but they are pending until the subscription is saved. Countries that are pending can be removed from the bridge configuration. Click the **x** icon to delete the country.

Note: After the multi-country bridge is saved, child bridges can be disabled but cannot be removed.

5. Define the following settings in the **Network Data** section:
   - **System** - Select the source system for the subscription. Typically, this is the org ID of the CRM org.
   - **Target subscription** - Select the target subscription for exporting the records. The list is filtered by the source system you selected.

6. To connect to Veeva CRM, expand the **External Credential** list and select the CRM org credential or Salesforce credential that is stored in Network on the External Credentials page.



   Click **Test Connection** to validate the credentials.

7. The **Advanced Settings** section contains optional settings.
   - **Revision Data Value** - Type the delta start ID that you want the target subscription to run from. For example, if you want to run a subscription starting with the last record from the previous export, you can add the Network ID of the record here. The Delta start and end IDs are available in the Job History section on the target subscription page or in the Job Details page. Typically, this value should be left empty.
   - **Enhanced Inactive Record Sync** - Select this option if you want Veeva CRM to be updated to reflect inactive records in Network.

   In Veeva CRM, the setting `FILTER_INACTIVE_NETWORK_RECORDS_vod` must also be enabled for the inactive records to sync between the two applications.

8. In the **Job Trigger Configuration** section, choose the job schedule. Schedules are set for the multi-country configuration; individual schedules cannot be set for each country.

   Optionally choose to trigger an email depending on the job outcome.

   Note: Triggers to start a subsequent subscription job when the Network Bridge job completes are not supported for multi-country bridges.

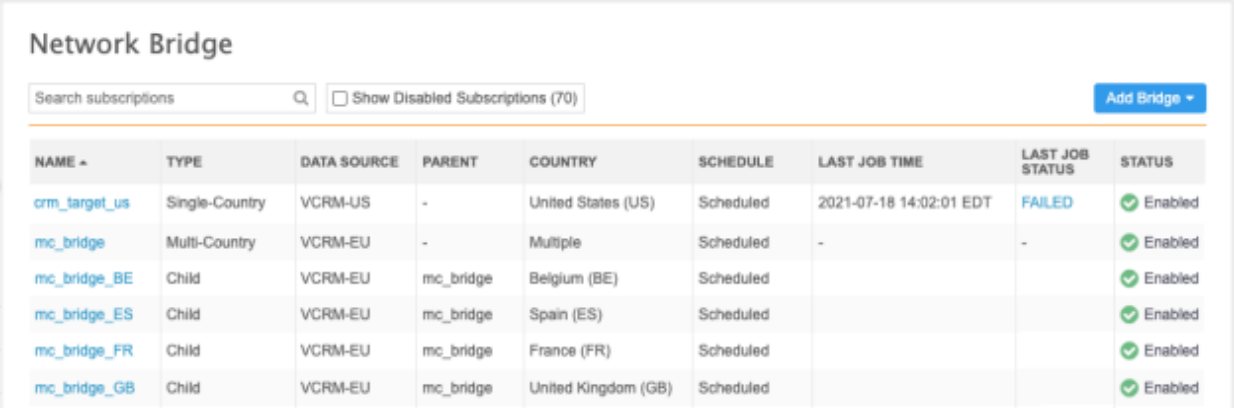
9. **Save** your changes.

When you save the bridge, the countries will be generated as child bridges. They will be enabled by default.

The list on the Network Bridge page is updated to include these new subscriptions.

Network Bridge page

The list on the Network Bridge page identifies each bridge type as **Single-Country**, **Multi-Country**, or **Child**. Child bridges are enabled by default when they are generated from the multi-country bridge.

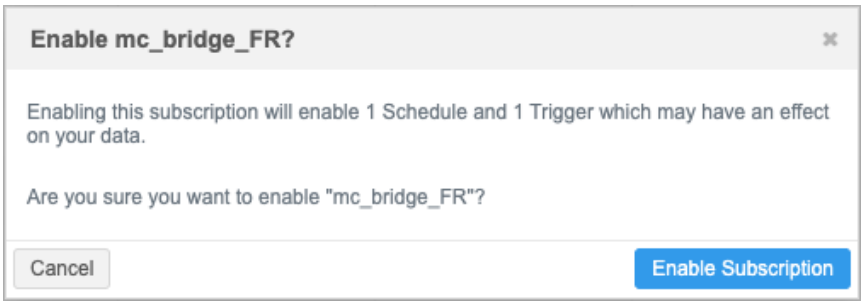


Enabling and disabling bridges

Click the value in the **Status** column to enable or disable a multi-country or a child bridge.

Enable

- Multi-country bridge - When you enable a multi-country bridge, you can choose to enable all child bridges. The child bridges will be listed in the dialog.
- Child bridge - When you enable a child bridge, the dialog lists any job schedules or job triggers that are affected.



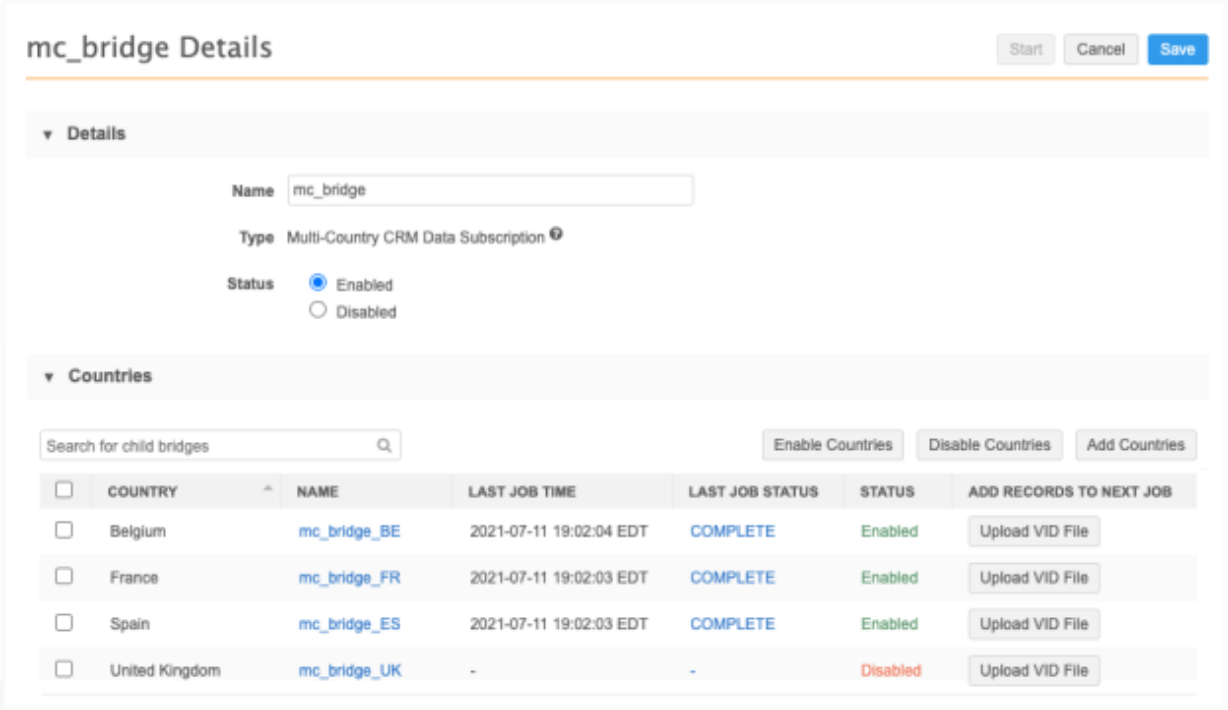
Note: If the parent bridge is disabled, it will also be enabled when you enable the child bridge.

Disable

- Multi-country bridge - When you disable a multi-country bridge, all child bridges are also disabled by default.
- Child bridge - When you disable a child bridge, the dialog lists any job schedules or job triggers that are affected.

Multi-country bridge details

After the multi-country bridge configuration is saved, the bridge's Details page lists the child bridges in the **Countries** section. You can view the time that the last job ran and the job status for each country .



Multi-country bridge name

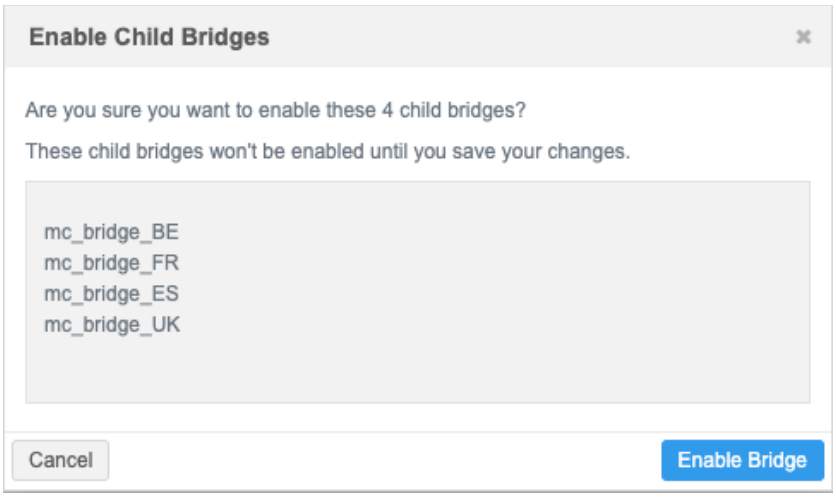
If you change the multi-country bridge name after you have created child bridges, the child bridge names will also be updated.

Child bridges

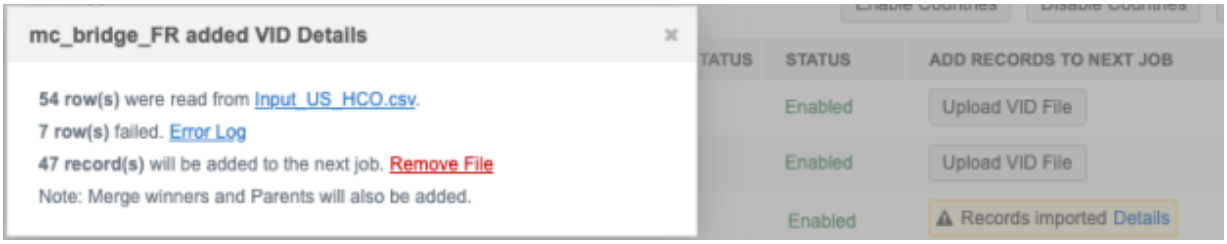
For each country, you can take the following actions on the multi-country bridge Details page:

- **Enable** - Select the country and click **Enable Countries**. Multiple countries can be selected and enabled at the same time.

  In the dialog, click **Enable Bridge**. When you save the multi-country bridge configuration, the selected child bridges will be enabled.

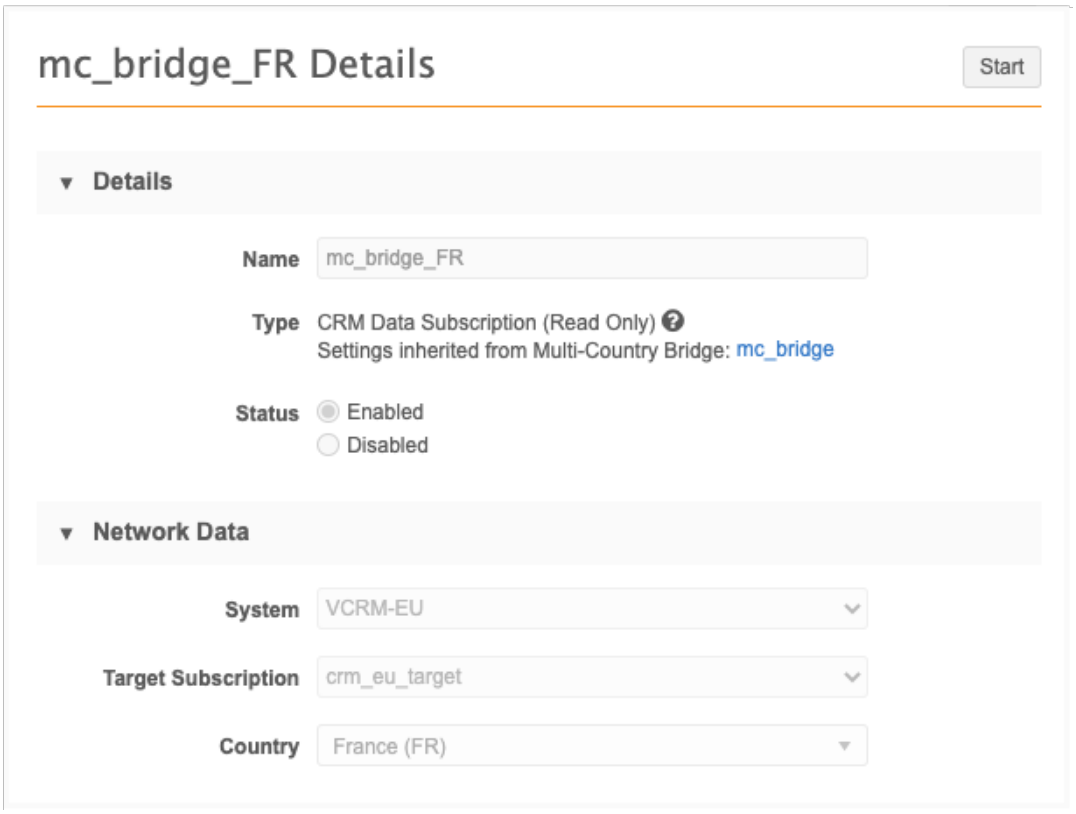


- **Disable** - Select the country and click **Disable Countries**. Multiple countries can be disabled at the same time.
- **Upload VID File** - Click to add a .csv file containing one column of Veeva IDs to export the next time the job runs. When the file is added a confirmation message displays. Click **Details** to review the VID details.



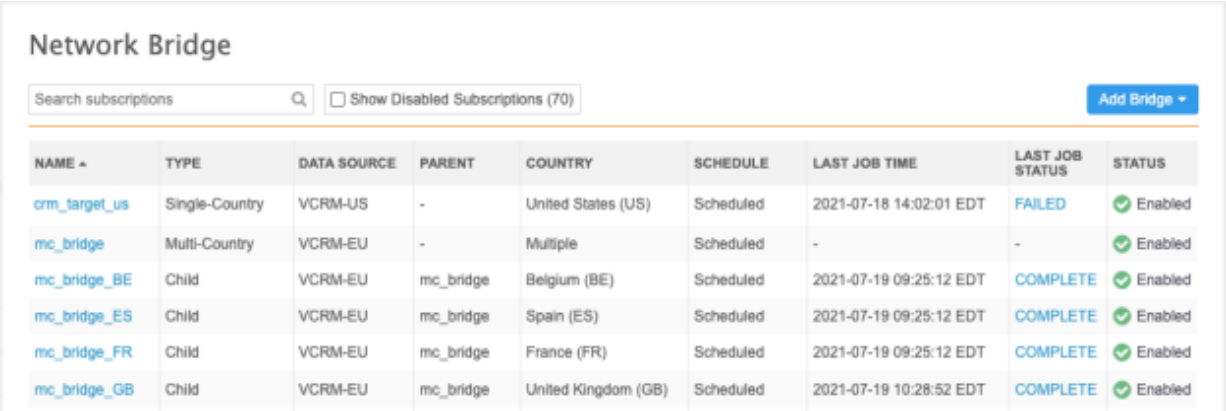
- **View details** - Click the name of the child bridge to open its Details page and review the settings inherited from the multi-country bridge. The data is read-only.

Tip: To manually run the child bridge job from this page, click **Start**.



Run a multi-country bridge

The bridge can run on a schedule or run manually. When it runs, all of the enabled child bridge jobs begin and run in parallel. When the jobs complete, the details are updated for each child bridge.



To review the job details for each child bridge, click the child bridge name or the status in the **Last Job Status** column.

Configuration management

Administrators can export multi-country bridge configurations to a target environment.

Dependencies

When you create the export package and add the multi-country bridge, the following dependencies are automatically added:

- Child bridges
- System
- Target subscription

The following dependencies are excluded from the package:

- External Credentials
- Schedules

Schedules and credentials must be created in the target environment.

Considerations for multi-country bridge name updates

Changes to the multi-country bridge name in the source environment will not update child bridge names that have been created in the target environment.

Configuration management

CUSTOM OBJECT DEPENDENCIES

21R1.1

You can now remove data domains from export packages if at least one domain remains in the package for the main custom object. There is an automatic dependency between main objects and data domains. If you have a custom object in two different domains; both data domains are added when you move the custom object into the export package.

Previously, if you tried to remove a data domain and then you clicked **Validate Selection**, the domain would be moved back into the export package. Now, the domain is no longer added again if one domain remains in the package for the custom main object. This is helpful if you have data domains in your development environment that you do not want to export to production environments.

Note: If you remove all data domains, they will all be moved back into the package when you validate the export package.

This enhancement is enabled in your Network instance by default.

OPT OUT MATCH SETTINGS

21R1.1

The Opt Out Matching Settings can now be exported to target environments. When you are creating an export package, the **Opt Out Matching Settings** can be selected in the **Available Configurations** pane.

This enhancement is enabled by default in your Network instance.

API

VERSION UPDATE

21R2

The Network API is updated to v24.0.

As with all version updates, Integration Users should continue to use v23.0 until there is a change for v24.0 that they want to apply.

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

BATCH REJECT/APPROVE CHANGE REQUESTS

21R1.1

You can now insert resolution note comments or codes for each data change request (DCR) when they are automatically accepted or rejected using the Batch API calls. Previously, a default resolution note was applied to each DCR. Now, users can view the specific comments to know why the DCR was rejected.

Parameters

Two parameters have been added to the Batch Reject Change Request and Batch Approve Change Request API to support this enhancement.

Name	Description	Required?
`comment`	A text resolution note.	False
`code`	A code from your resolution note template will be inserted as the note.	False

You can use the `comment` parameter or `code` parameter (if you have a resolution note template). If you provide both, the `comment` will override the template.

Sample PUT data

```
{
   "change_requests": [
     {
       "change_request_id": "938220286194942015",
       "comment": "This is custom comment",
        "code": "R-00010"
     }
   ]
 }
```

Sample response

```
"resolution_notes": [
                  {
                      "comment": "Duplicate change request submitted.",
                      "fields": [],
                      "created_date": "2021-02-09T10:46:44.125-08:00",
                      "code": "R-10008"
                  }
```

These enhancements are supported for Network API version 23 and later. If a resolution code or comment is applied using an older version of the API, or if you do not provide one of these parameters, the default resolution note (`Batch-Approve` or `Batch-Reject`) will be used.