Veeva Network

Veeva Network 23R2.0.1 Release Notes

August 2023

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About these Release Notes

These Release Notes describe all features that are included in Veeva Network 23R2.0.

SUBSCRIBE TO RELEASE NOTIFICATIONS

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

Software releases and maintenance

- Veeva Trust Site

  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

The documents are posted in the following locations:

- Veeva Connect - Join the Network Community.

  To be notified as soon as the Release Notes are posted, go to your Veeva Connect profile and click **Settings**. On the Email Frequency page, expand the list and choose **Immediate**. Other notification options are **Daily** and **Weekly**.

- Veeva Product Support Portal

  Follow the Network Release Notes section to be notified when release documents are posted.

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

Browser requirements

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

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

Veeva Network is not supported on mobile devices.

Release Note updates

No features or enhancements have been added since the Early Release Notes were published.

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 23R2.0 major release.

			ST	DS	DM	AD
Search widget						
Search widget pre-fill	The Search widget can be prefilled with search terms.	23R2.0	●	●	●	●
Hierarchy Explorer widget						
iPad support	Hierarchy Explorer is supported for browsers on Apple iPad.	23R2.0	●	●	●	●
Usability enhancements	The widget UI is improved to help you easily navigate and discover hierarchy data.	23R2.0	●	●	●	●
Summary View rollup counts	Ancestors and rollup counts on the Summary View are now clickable so you can easily move through the hierarchy and explore the data.	23R1.1	●	●	●	●
Hierarchies						
Search within Key Networks	Use the @ symbol key to discover key networks and the HCPs and HCOs in all levels of their hierarchy.	23R2.0	●	●	●	●
Network Hashtags						
Telehealth hashtag	Use the #telehealth hashtag to find HCPs in the United States that offer telehealth services.	23R2.0	●	●	●	●
Profiles						
Adding sub-objects	The **New** sub-object button now displays when the Profile page is in read-only mode.	23R2.0	●	●	●	●
Relationship owner	Affiliation badges display on relationships to identify if the relationship is locally managed, owned by OpenData, or owned by a third party provider.	23R1.1	●	●	●	●
Send to OpenData	Add requests that are sent to OpenData contain the default message, OpenData Takeover Request, in the Requester Notes.	23R1.1	●	●	●	●

			ST	DS	DM	AD
Data components						
Profile tabs	Data components display as tabs on records so you can quickly access the data and understand the complete view of a record.	23R2.0	●	●	●	●
Network reporting data	Data components can be created for report data so you can see all the relevant Network data (DCRs, sub-object data) for the record.	23R2.0	●	●	●	●
Data Model						
Cluster management	This feature now supports cluster data for South Korea.	23R2.0			●	●
NEX function	Use the new STRINGSORT function to sort collections in ascending or descending order.	23R2.0			●	●
Formatted name	The custom calculation has been updated for the formatted_name__v field for Vietnam.	23R2.0			●	●
Inactivating fields	Before fields are inactivated, the confirmation dialog displays the affected Network hashtags that will also be inactivated.	23R1.1			●	●
Transformation queries						
Source view data	Outbound transformation queries can now process source view files.	23R2.0			●	●
Lookup table output	Use transformation queries to automatically load data into lookup tables.	23R2.0			●	●
Source subscriptions						
Archive source files	Files used in source subscription feeds can now be automatically archived in Network's FTP server.	23R2.0			●	●

			ST	DS	DM	AD
Users						
Unlock user account	You can now unlock your own user account.	23R.1.1.2	●	●	●	●
Password management	Administrators can now unlock user accounts and reset passwords for individual users.	23R1.1			●	●
Integrations						
Hashtags in Veeva CRM	Network hashtags can be stored in an alternate field in CRM if the Account Identifier is already in use.	23R1.1				●
Admin settings						
Amazon S3 credentials	A Veeva naming convention for IAM role names is required for new S3 credentials.	23R2.0				●
API						
Version update	The Network API is updated to v30.0.	23R2.0	Developers			
Custom fields on OpenData search results	Custom fields that contain default or calculated values can now display in the Search API for OpenData search results.	23R1.1	Administrators and Developers			
Match API	Reference value labels and reference aliases are now supported in Match API results.	23R1.1	Administrators and 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.

Search widget

SEARCH WIDGET PREFILL

23R2

When the Search widget is embedded in your internal application, it can be configured to do the same search most recently performed in your app. Web developers can add properties to the widget code to populate the widget with the same search terms.

For example, before adding an account, business processes might require you to search a downstream system like Service Cloud for an existing account. If a match isn't found, you can use the Search widget to see if the account exists in Network or OpenData. To avoid entering the same data twice, the Search widget can be set to automatically search for the terms that you just entered in your downstream system.

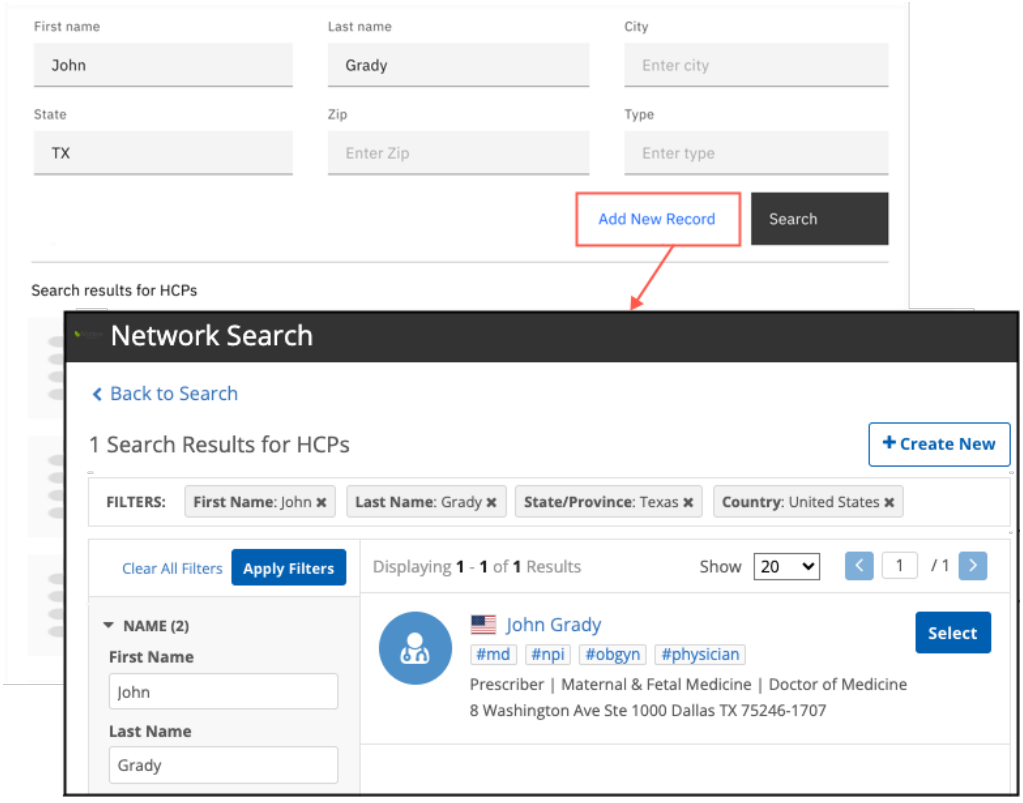
This enhancement is not enabled by default. Web developers can add the properties to the widget code.

Note: The Search widget configuration must support the Advanced Search form to use this enhancement.

Example

In this example, the search widget is embedded in an internal application. After a user searches locally for an HCP, they can launch the Search widget to search Network and OpenData for that HCP. The Search widget is configured to prefill the search form and automatically search for the terms that the user already entered in their internal app.

When the Search widget opens, the search results automatically display for those search terms.

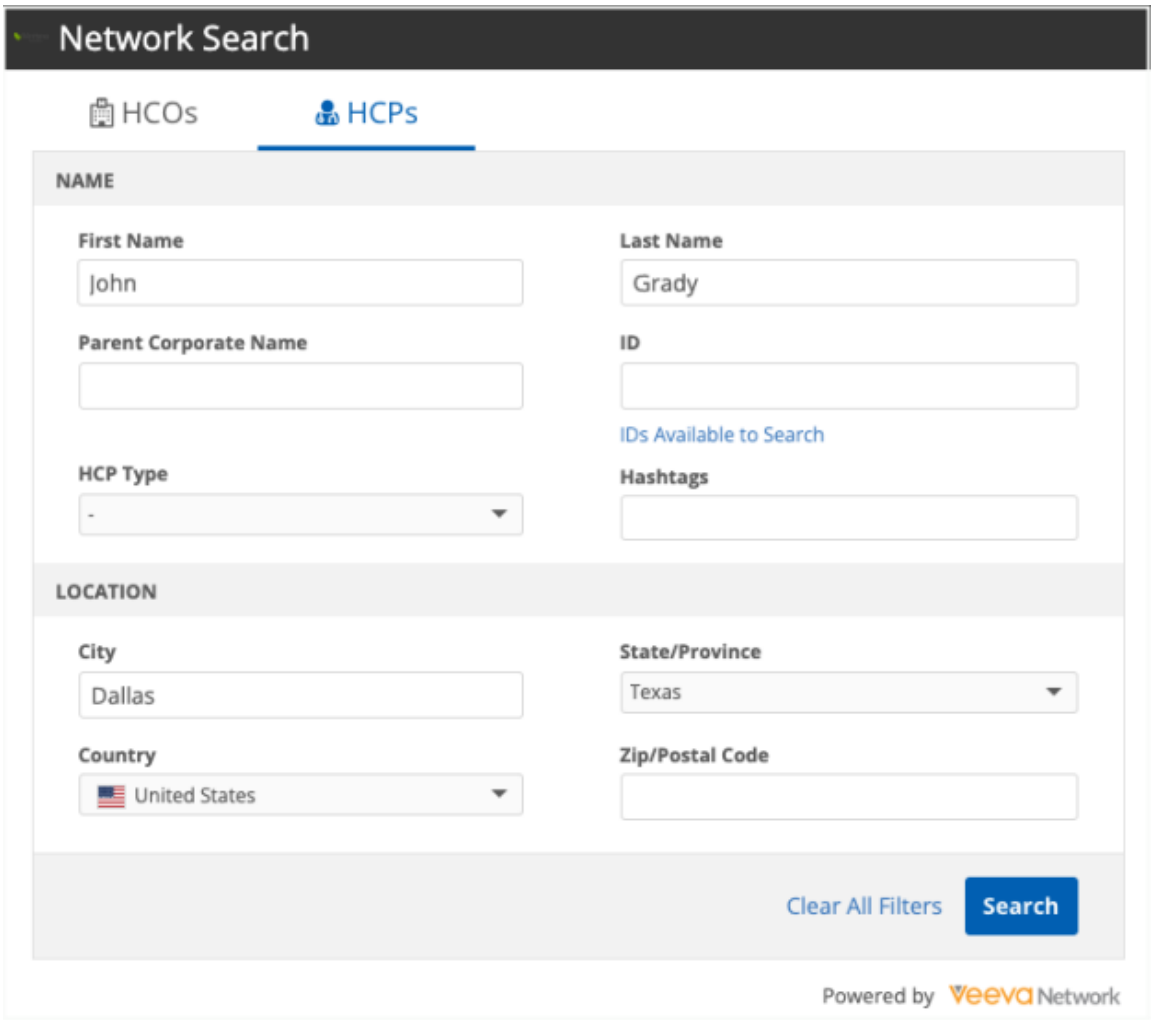


Widget properties

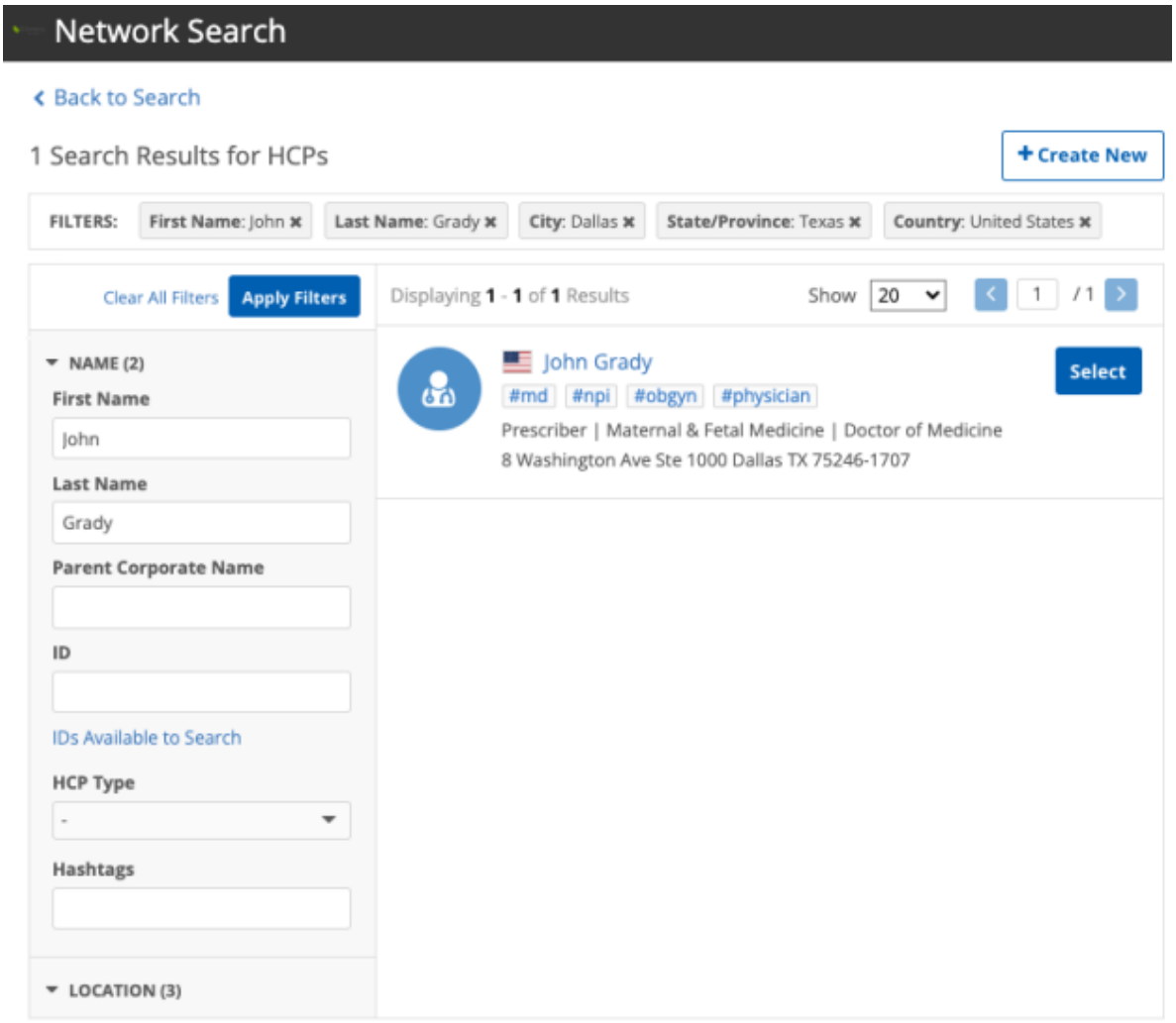
To support this enhancement, two properties are available for the Search widget code:

- **`pre-fill-search-form`** - Use this property to prefill the Search widget advanced form with the search terms that you used in your downstream system.

  When you open the Search widget, the Advanced search form displays with the pre-filled search terms. You can add criteria and then click **Search** to view the results



- **`auto-search`** - Use this property with the `pre-fill-search-form` to prefill the search form and automatically open the widget to the search results page.



Note: The `auto-search` property cannot be added to the widget code without the `pre-fill-search-form` property.

Add the properties

Web developers can add the properties to the `veeva-network-search-widget` element in the widget code.

Example widget code

```
<body>
  <div id="widgetContainer">
    <veeva-network-search-widget
      id="widgetEl"
      auth-domain="https://pmpush8-307.vdmdev.com"
    widget-name="SearchWidget"
    widget-id="MzA3Ozs7c2VhcmNod2lkZ2V0X19j"
    pre-fill-search-form="entity_type=HCP&hcp.first_name__v=Jack&hcp.last_name__v=Graham&address.locality__v=Dallas&address.administr
    auto-search
    enriched-results
    enriched-results-language="en"></veeva-network-search-widget>
  </div>
```

Supported searches

When these properties are added, the search terms that you use in the downstream system must match the fields used in the Search widget.

Supported values

- Entity type - Must be HCP or HCO.

  If `entity_type` is not defined or is not HCP or HCO, the property is ignored.

Supported fields

All standard and custom fields for Veeva objects (HCP, HCO, Address, License, Parent HCO) are supported if they are used in the Advanced search form.

HCP Example

```
entity_type=HCP&hcp.first_name__v=Jack&hcp.last_name__v=Hughes&address.loca
lity__v=Chicago
```

HCO Example

```
entity_type=HCO&hco.corporate_name__v=Barnes%2ASmith&address.locality__v=Ch
icago
```

Special fields

- ID__s - Search by ID field
- hashtags - Search by hashtag

Additional considerations

- Each term is separated by the ampersand (**&**) symbol.
- If a term has spaces, symbols, or special characters, they must be encoded.
- All other fields are ignored.

Hierarchy Explorer widget

iPad support

23R2

The Hierarchy Explorer is now supported for browsers on Apple® iPad® .

Usability enhancements

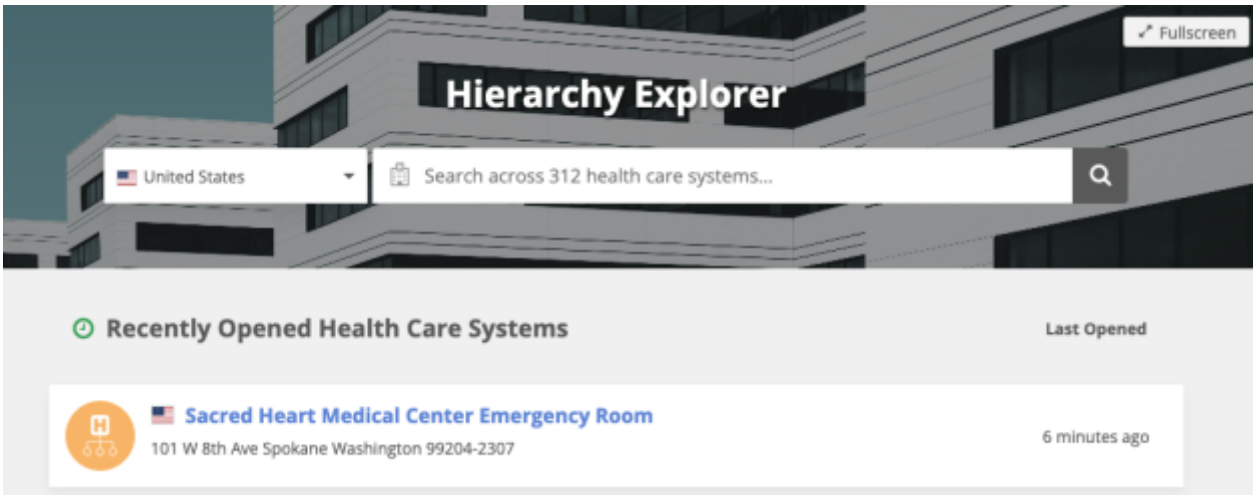
23R2

A series of usability improvements have been made to the Hierarchy Explorer so you can more efficiently view, explore, and understand hierarchies.

The following enhancements are available in this release.

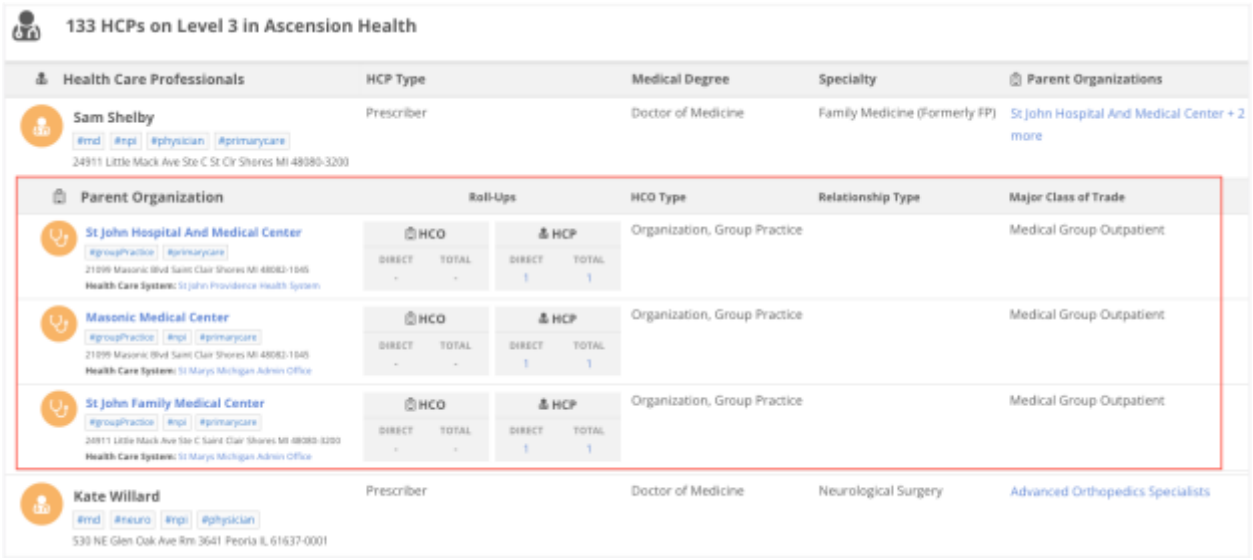
Style and performance

Several style changes have been made to the widget, for example, the banner is updated on the homepage. As you explore the hierarchies and Summary View, you'll notice significant performance improvements.



Summary View - Affiliated HCOs

HCP rollup count dialogs now display details about associated parent HCOs. Click the HCO name in the **Parent Organization** column to open the **Parent Organization** section below the HCP.

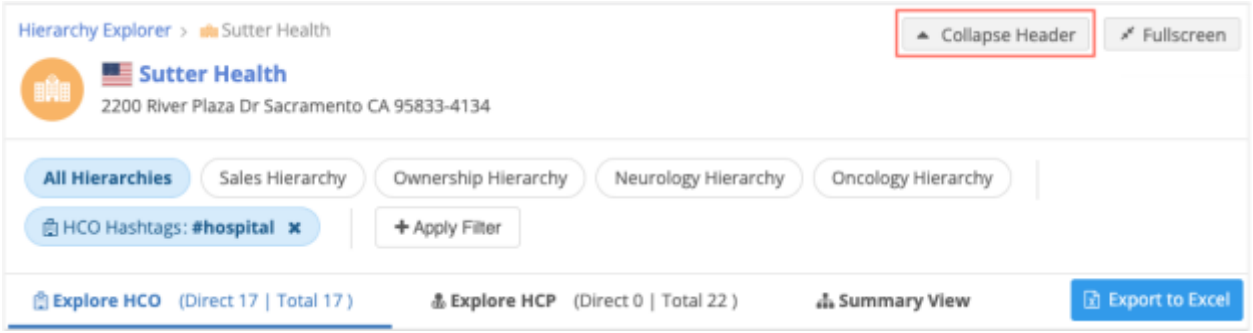


Use the **Parent Organization** section to explore the following details:

- **Health system** - Each parent organization displays the related health care systems so you can see if the HCO rolls up to a different health system.
- **Relationship type** - Use this column to see how the HCP is related to the HCO. For example, an HCP might be affiliated with a several HCOs, but they submit their claims through a specific HCO.
- **Roll-Ups** - A count of the HCOs and HCPs that are affiliated with the parent organization. Click the HCP count to view other HCPs that work with the targeted HCP at that parent organization.

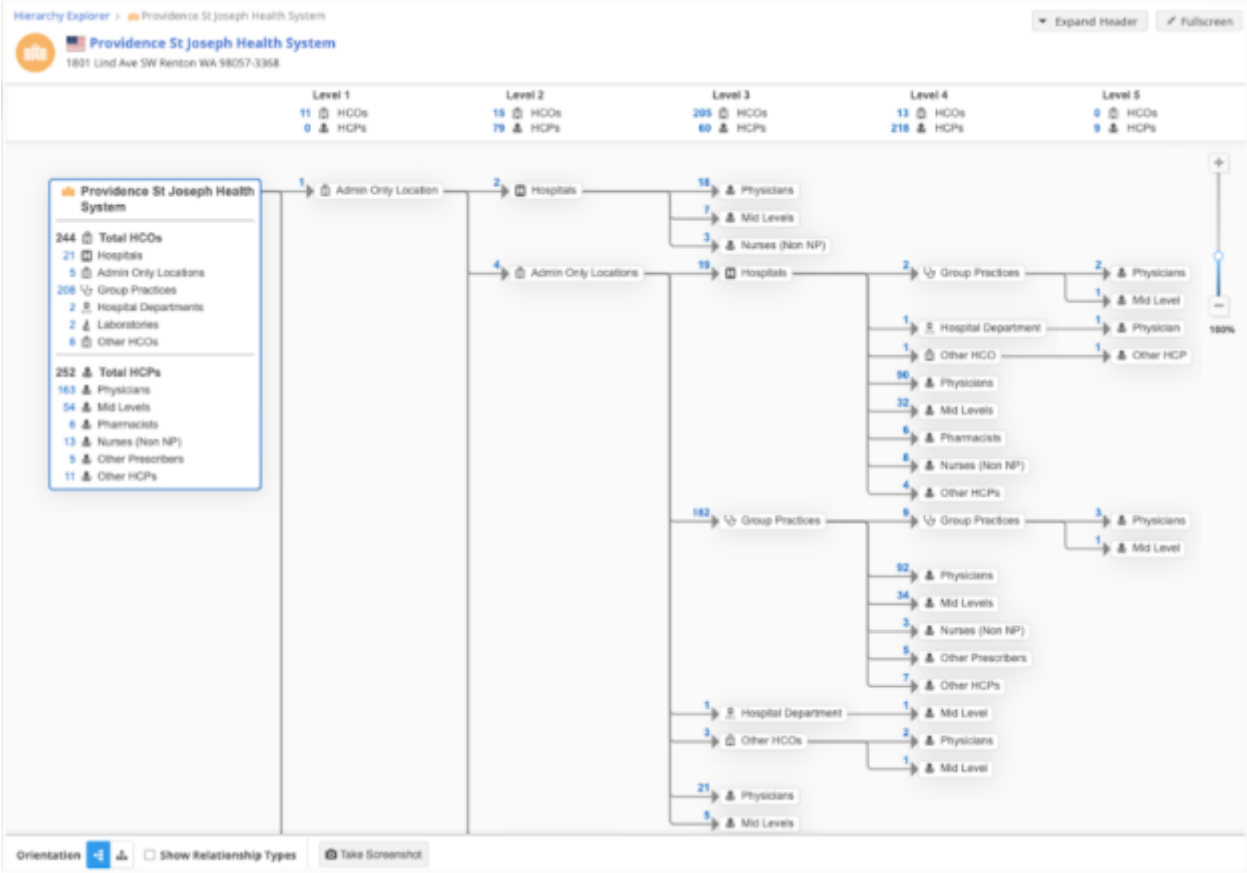
Collapse header

To expand the hierarchy viewing area, you can minimize the header. Click **Collapse Header**.



This hides the hierarchies, any applied filters, the **Explore HCO** and **Explore HCP** tabs, the **Summary View** tab, and the **Export to Excel** button.

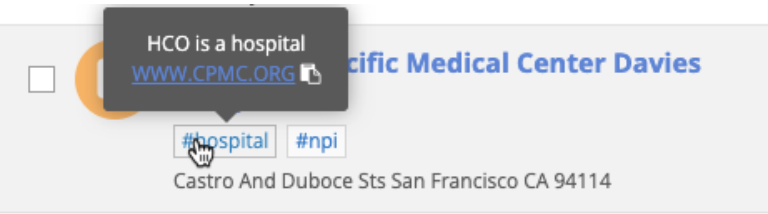
This allows you to view more information on your screen.



To view the full header again, click **Expand Header**.

Hashtag tooltips

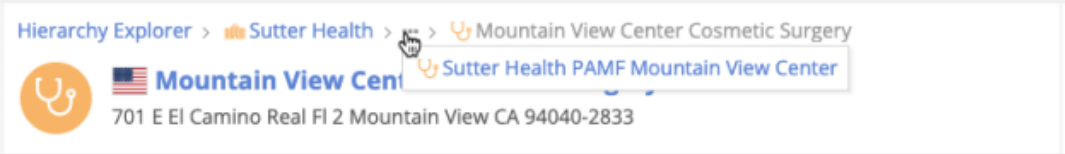
Hashtags now display tooltips. Hover over the hashtag to view a description of the hashtag and supporting details. For example, `#hospital` hashtags can contain a link to the HCO website.



Breadcrumbs

Breadcrumbs detail the path you take through the hierarchy. Use the breadcrumb to navigate back through the hierarchy.

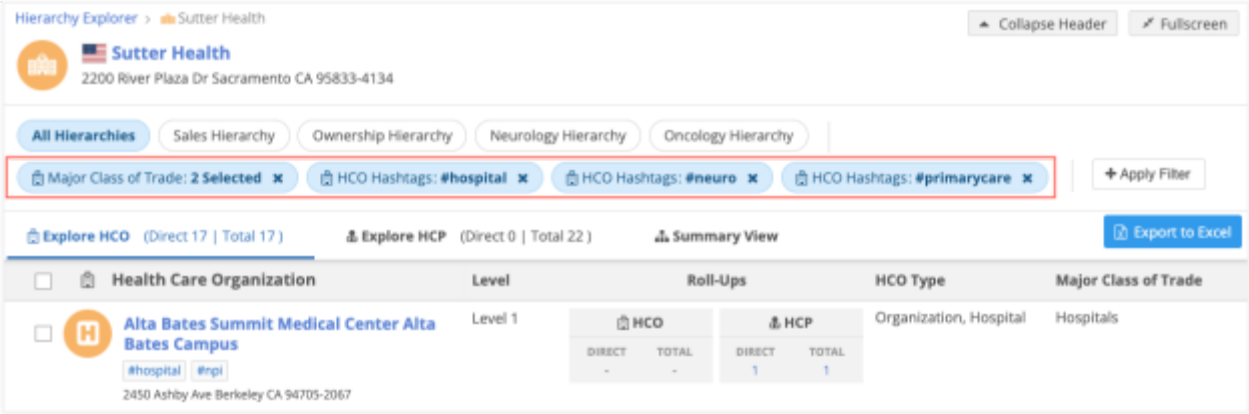
Hover over truncated breadcrumbs to view the accounts.



Managing filters

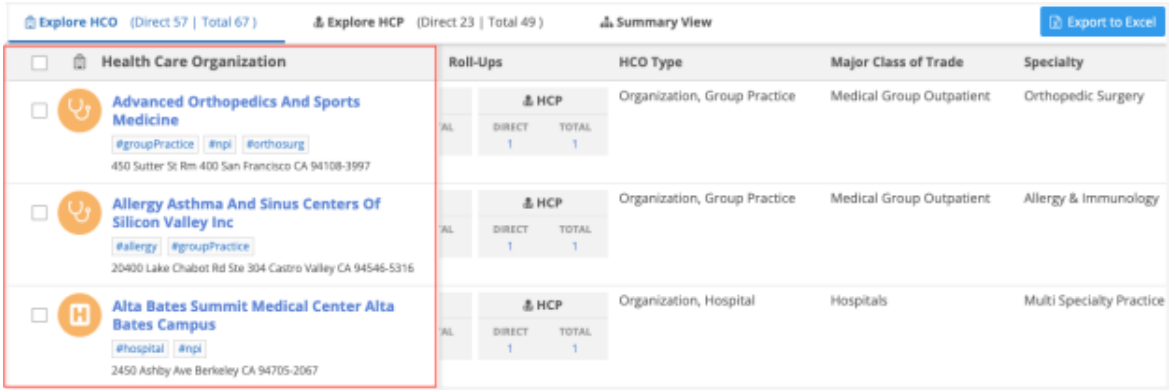
Filters display more prominently on the hierarchy.

- Click a filter to open the **Active Filters** dialog.
- Click the **x** icon to quickly remove the filter.



Viewing HCO/HCP data

On the **Explore HCO** and **Explore HCP** tabs, the **Health Care Organization** column and **Health Care Professionals** column remains frozen when you scroll through the rows, so the name is always in focus.



SUMMARY VIEW

23R1.1

All of the ancestors and rollup counts on the Summary View are now clickable so you can easily move through the hierarchy and explore the data. The rollup counts open a popup to display a detailed view of the HCOs or HCPs in that grouping.

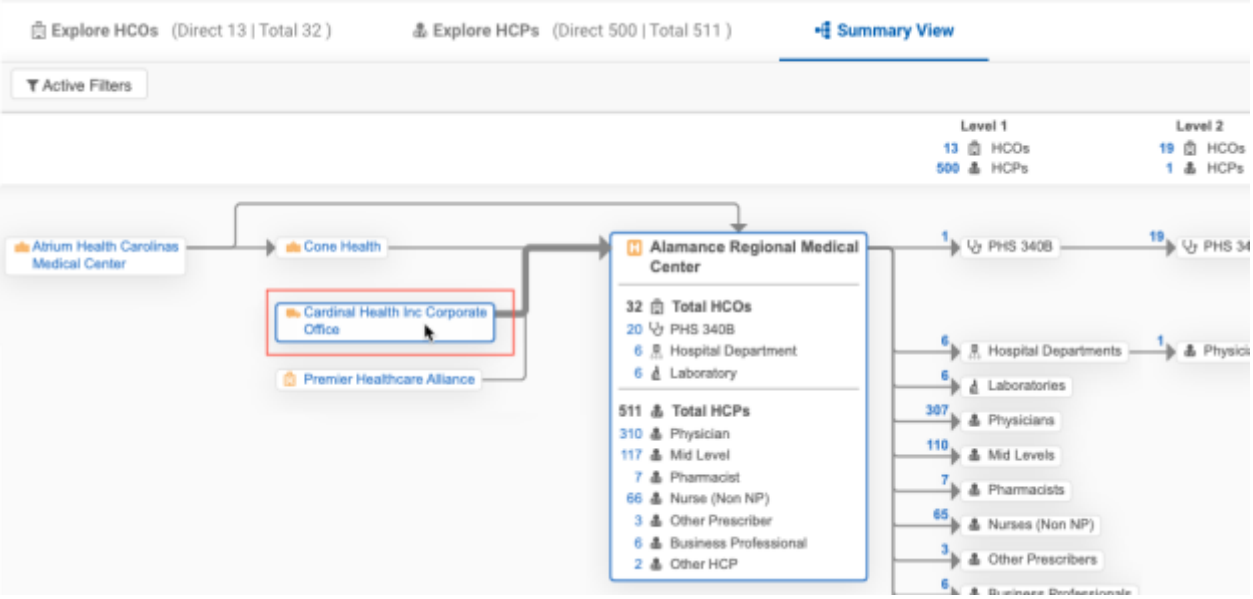
These enhancements are enabled by default in your Network instance.

Summary view focus

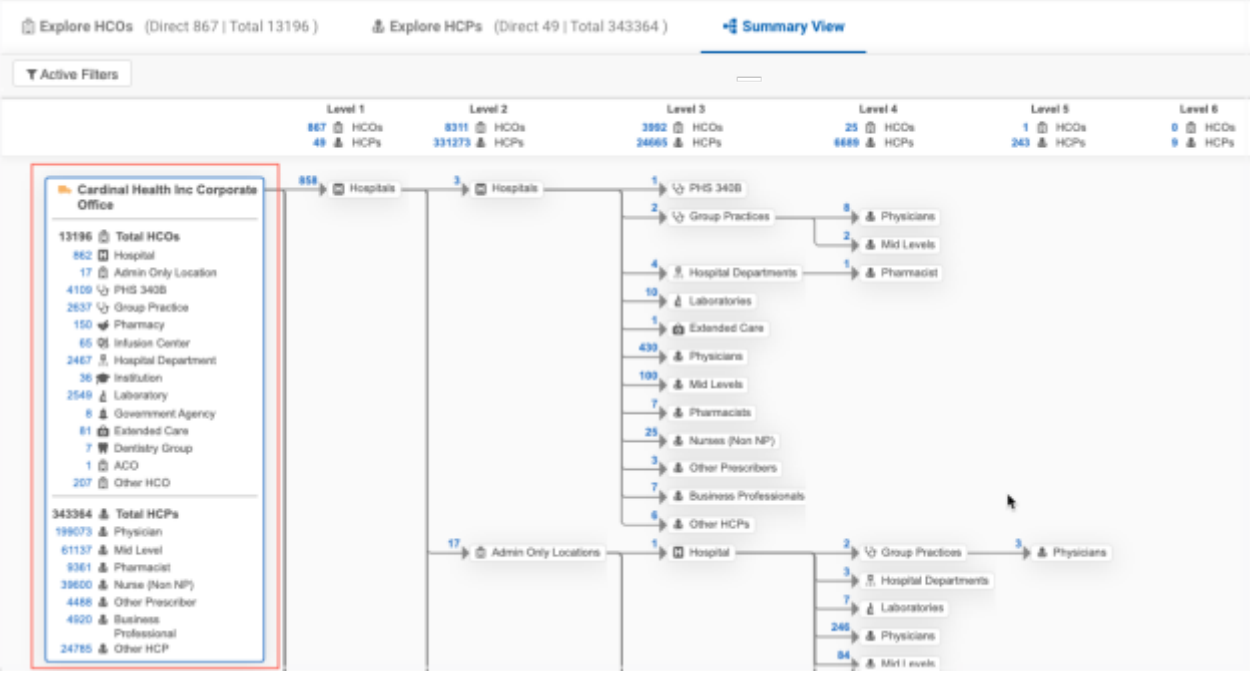
The Summary View can focus on any HCO in your hierarchy. Click an ancestor HCO to quickly change the focus of the view to that HCO. This enables you to quickly move up and down the hierarchy and view the rollup counts on different HCOs.

Example

On the Summary View for Alamance Regional Medical Center, click the Cardinal Health Inc Corporate Office ancestor (HCO).



The Summary View updates to focus on Cardinal Heath so you can see the HCO and HCP rollup counts for that HCO.

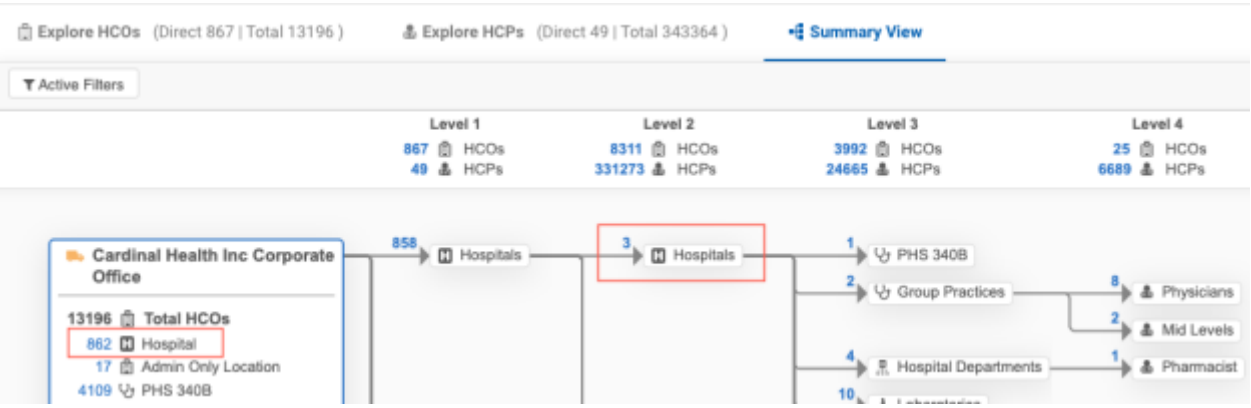


Rollup count details

All rollup counts on the Summary View are now links. Click the count to open a popup that displays the entity details for that group.

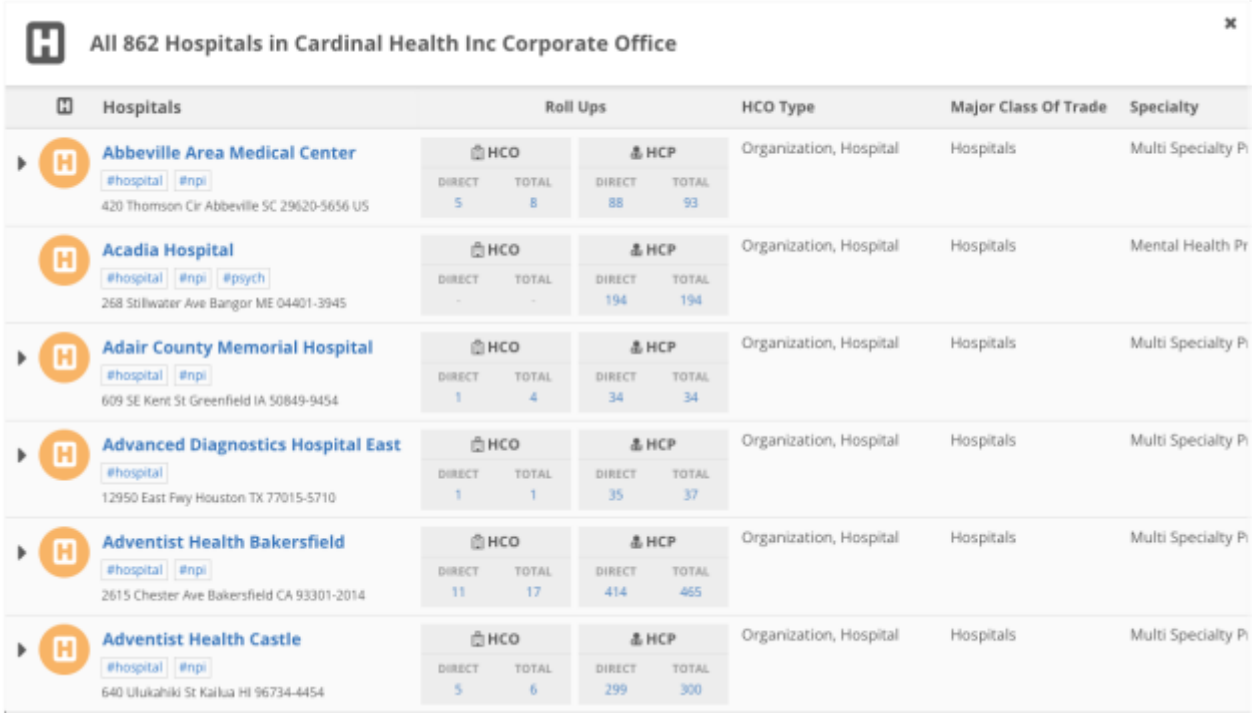
Example

On the Summary View, there are 862 Hospitals in the Cardinal Health HCO.



In the HCO breakdown section, click the Hospital (**862**) count.

A dialog opens to display all the accounts for the hospitals grouping for Cardinal Health.



To view the HCO or HCP rollups for a specific level, click the count in a hierarchy level. For example, in Level 2, click the **3** count beside Hospitals.

The dialog displays only the hospitals on this level of the hierarchy.

The left column in the group popups remains fixed as you scroll through the columns to view field details.

Tip: Any **Active Filters** that are applied to the hierarchy are also applied to entities in the rollup popups.

HCO count popup

When you click an HCO rollup count on the Summary View, the popup displays the following information:

- **Header** - Includes the HCO type and a count of the HCOs in the rollup and identifies the HCO that is the focus of the Summary View.

  The location in the hierarchy and the parent organization (and count) also displays when you click the rollup count in hierarchy levels.

- **HCO details** - All the HCOs for the selected HCO type are listed in alphabetical order.

  The details for each HCO include:

  - HCO name and primary address

    Click the HCO name to close the popup and change the Summary View to focus on that HCO.

  - Network hashtags
  - Rollup counts for HCOs and HCPs - Clicking a rollup closes the popup and opens the **Explore HCO** or **Explore HCP** tab with that HCO in focus.
  - Child affiliations - Click the **Caret** icon to expand the HCO and view child affiliation details.
  - HCO fields - All of the fields that display on the **Explore HCO** tab in the Hierarchy Explorer.

HCP count popup

Click an HCP rollup count on the Summary View to view details about the entities in the hierarchy.

The popup displays the following information:

- **Header** - Includes the HCP type and a count of the HCPs in the rollup and identifies the HCO that is the focus of the Summary View.

  The location in the hierarchy and the parent organization (and count) also displays when you click the rollup count in hierarchy levels.

- **HCP details** - All the HCPs of the selected HCP type are listed in alphabetical order by first (given) name.

  The details for each HCP include:

  - Name and primary address of the HCP
  - Network hashtags
  - Parent Organizations - Click the parent organization name to close the popup and change the focus of the summary view to that HCO.
  - HCP fields - All of the fields that display on the **Explore HCP** tab in the Hierarchy Explorer.

Hierarchies

SEARCHING WITHIN KEY NETWORKS

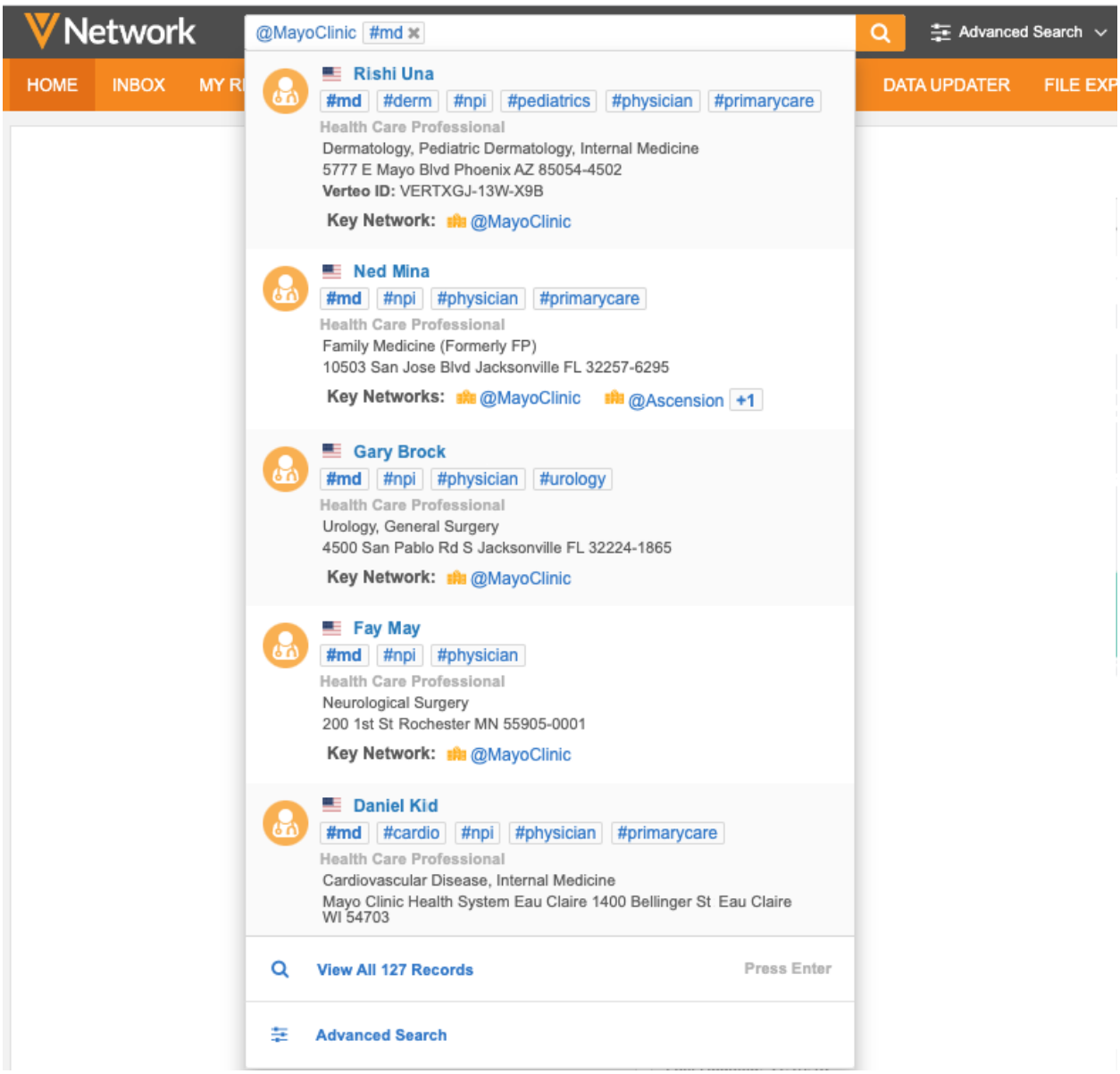
23R2

Key networks display on affiliated HCP and HCO record profiles and in search results. Use the **@** symbol to easily find HCPs and HCOs in all levels of the Key network's hierarchy.

Key network information can help you to quickly answer the following questions:

- What key networks (Health Systems (Sutter Health), Regional Health Systems (Dignity Health), Provider networks (Florida Cancer)) does an HCP work at?
- What key networks/health systems does an HCO roll up to for sales purposes?
- What hospitals are in this health system?

For example, by searching for `@MayoClinic #md`, you can find the list of all MDs that practice at the Mayo Clinic. Use this search feature to understand the HCPs and HCOs that roll up to these large organizations to help with business practices like incentive compensation, compliance, and to target specific accounts.



The full Key HCO Network Search feature is not enabled by default.

When the full feature is not enabled, key networks are supported for OpenData records only (currently US and UK records). Key networks on US OpenData records will be available in the 23R2.0.1 Production release. Key networks on UK OpenData records will be available by September 2023.

Enable the full feature to identify your own key networks on locally managed records.

For more details, see the "Enable the feature" section below.

About key networks

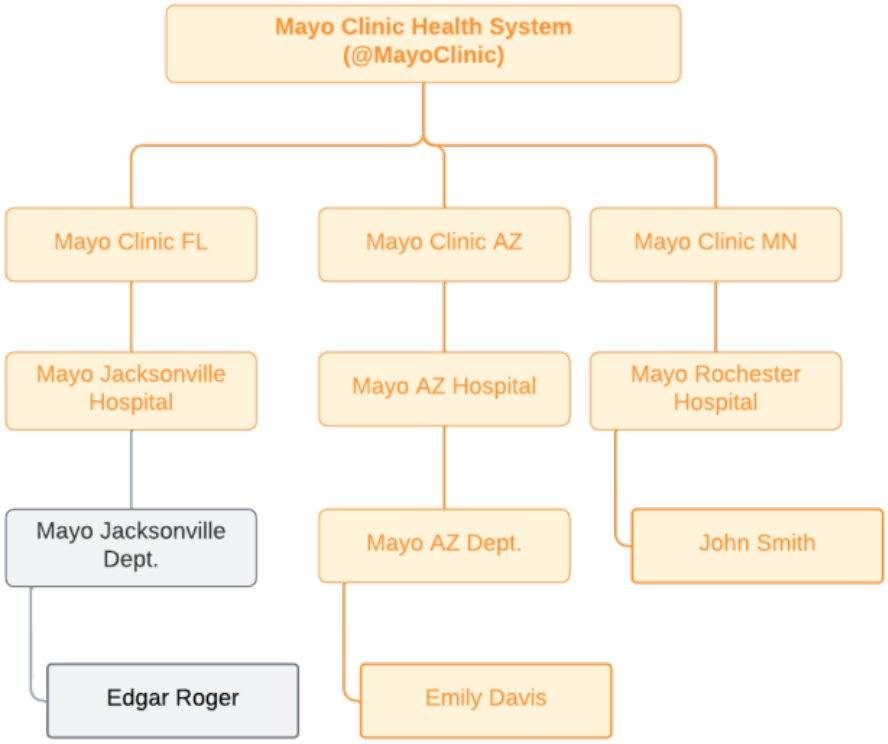
When you add key networks, only the top-level HCO is flagged. Network automatically associates the key network to affiliated records in all levels of that HCO's hierarchy. There is no need to flag all of the records in the hierarchy.

Search

When you use the key network (@) search, the search results display records in all levels of the key network's hierarchy that match your search criteria. All HCOs and HCPs that are affiliated to that HCO automatically display.

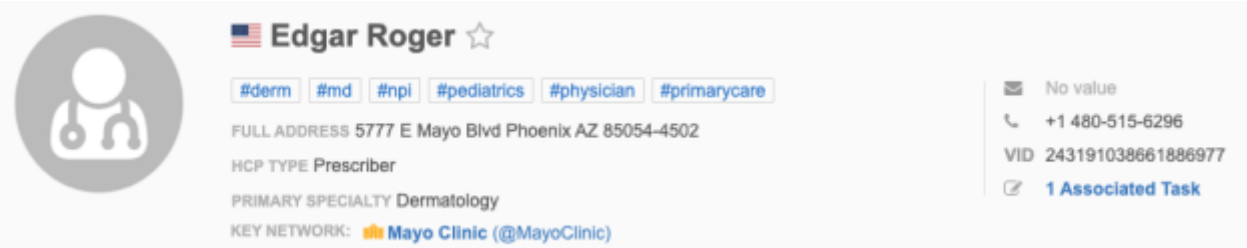
Example

If you search for the Mayo Clinic key network (@MayoClinic), all HCPs and HCOs that are affiliated to the Mayo Clinic display in the search results.



Profiles

When you view the profile of an affiliated HCP or HCO, the key network automatically displays.



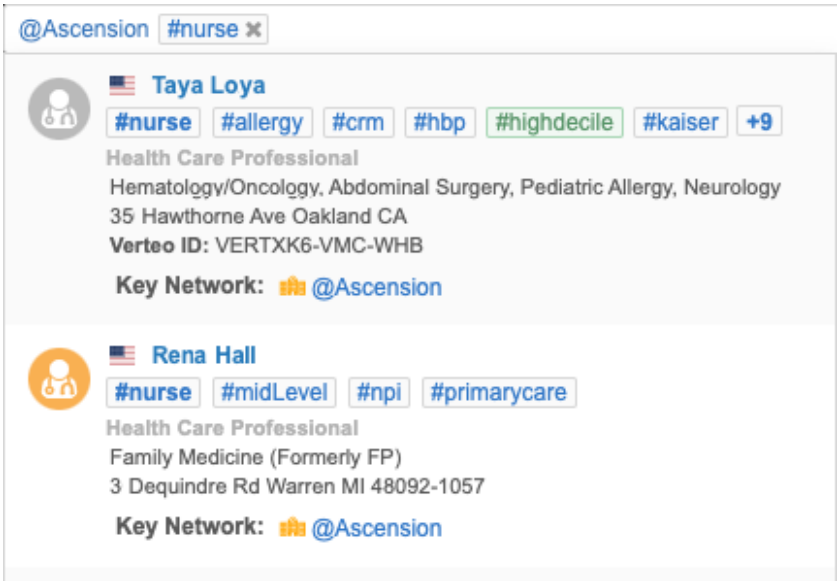
Search for key networks

To find key networks or IDNs, type the **@** symbol in the search bar. This searches for the HCO's alias (for example, **ArChildrens**). The list of HCOs identified as key networks in your Network instance and in OpenData display in the type ahead results.

The key networks are filtered to display only the HCOs in countries that you have access to through your data visibility profile. If you have access to multiple countries, the primary country of the key network displays.

Search for a key network name

When you search for specific key networks using the **@** symbol, the alias displays as blue if it exists in the key network list.

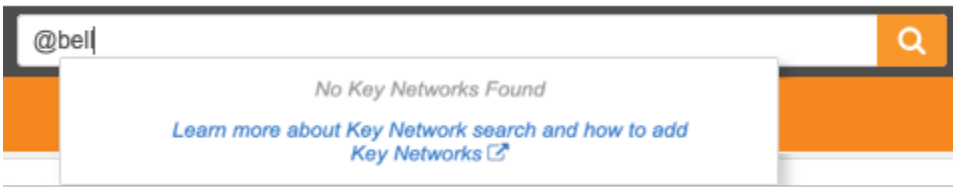


The type ahead results display records in all levels of the key network's hierarchy that match your search criteria. Records that you do not have access to through your data visibility profile are filtered out of the results.

Tip: Use the **Advanced Search** form to find key networks and include additional search criteria to narrow your results.

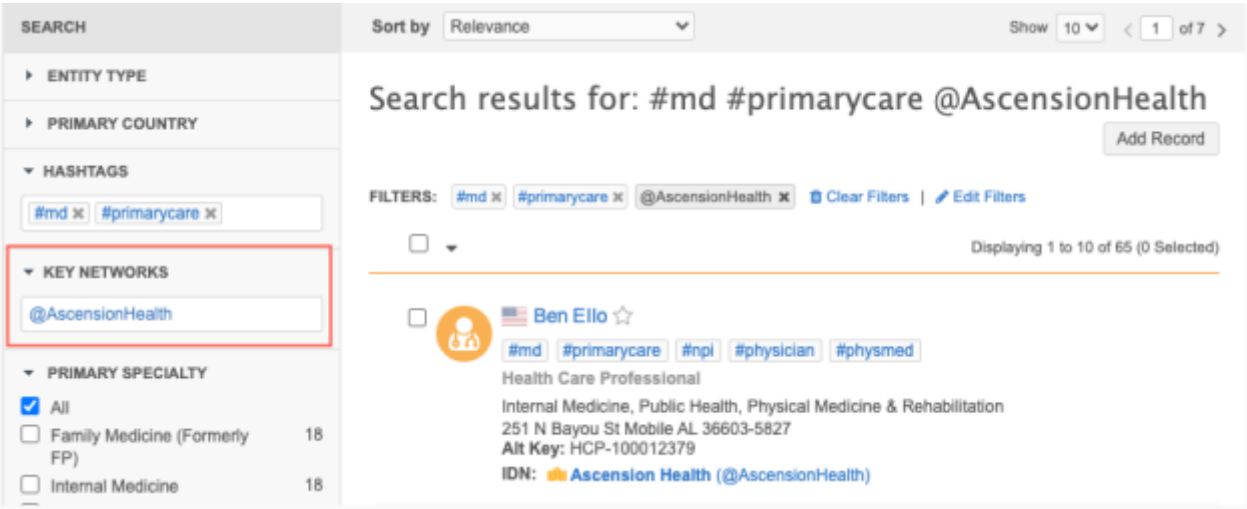
If there are no results, the message "No Key Networks Found" displays.

Administrators can click a link to navigate to the data maintenance job that provides information about identifying IDNs.



Search filters

Use the **Key Networks** filter to narrow your results to HCOs and HCPs in a specific hierarchy.



Search API

Searching for key networks is supported in the Search API.

To filter your results on a key network, use the **@** symbol and Network alias in the **q** parameter.

Example

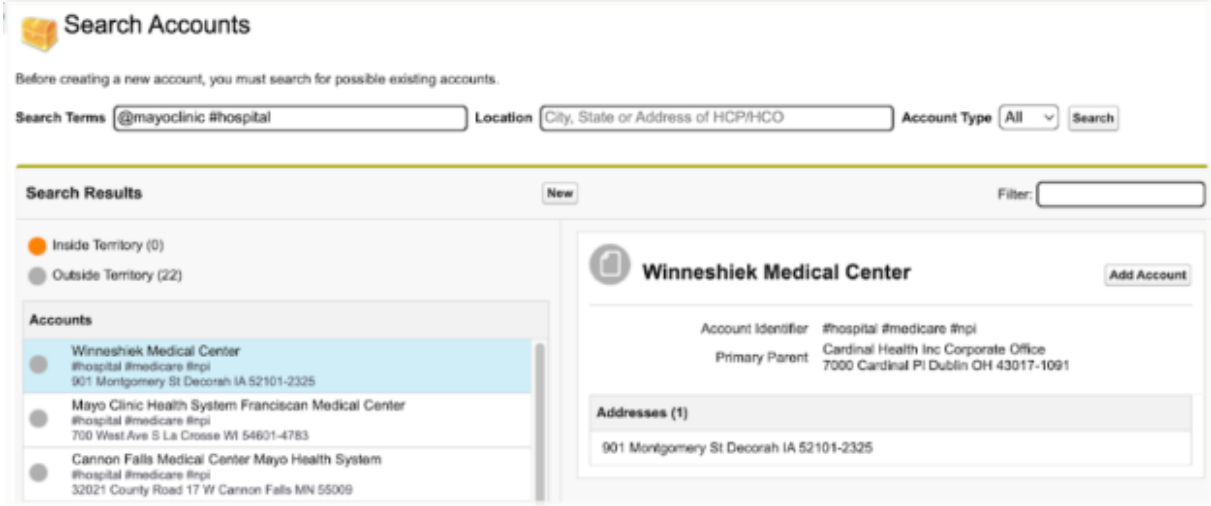
```
https://my.veevanetwork.com/api/v29.0/search?q=@mayoclinic
```

Veeva CRM Network Account Search

CRM field users can search for records in Network Account Search using the key network alias.

Example

Field users can search for `@mayoclinic #hospital` to find all hospitals in the Mayo Clinic hierarchy.

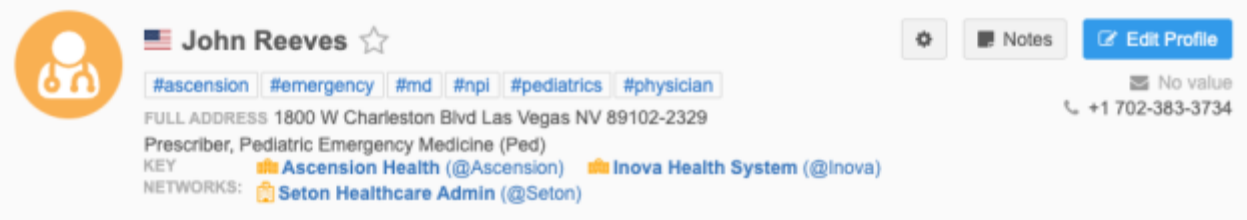


View key network information

Key networks/IDNs are added to HCO and HCP profiles on record profiles and in Network search results. (Network search, Search API, and Network Account Search (Veeva CRM)).

Profile page

Key Networks display on the summary header.



Network search results

Searching for a record (with or without applying a key network filter) displays the key networks that the HCO or HCP is affiliated with.

Enabling Key Network Search

By default, OpenData provides a list of key networks for US and UK records. If you subscribe to OpenData for those countries, those key networks are available in your Network instance.

Enable the feature to support locally managed records.

Feature is not enabled

Searching for Key Networks is supported for OpenData records in your Network instance and for OpenData records that have not yet been downloaded.

Veeva OpenData flags HCOs as key networks. A data maintenance will sync the available key networks to your Network instance. Your OpenData HCPs and HCOs will be updated with those key networks. You can manage the data maintenance job schedule and view the job details (including the count of updated and total records identified as key networks).

Supported actions

- Search for key networks (OpenData records only)
- View key networks on associated records.
- Export the list of key networks

Note: If you download a record from OpenData, the key network is removed from the record until the data maintenance job runs.

Feature is enabled

When the feature is fully enabled, you get the following benefits:

- Flag your own HCOs as key HCO networks (OpenData records and locally managed records)

  Example: You can flag all Children's Hospitals as key networks.

- Leverage your own hierarchies as part of the calculation to affiliate HCPs and HCOs with key networks

  Example: You can incorporate your primary hierarchy as part of the hierarchy calculation

- Affiliate your local HCP and HCO records with key networks (leverage your own key networks, hierarchies, and local HCPs and HCOs)

  Example: Key networks can be affiliated with your locally managed HBPs .

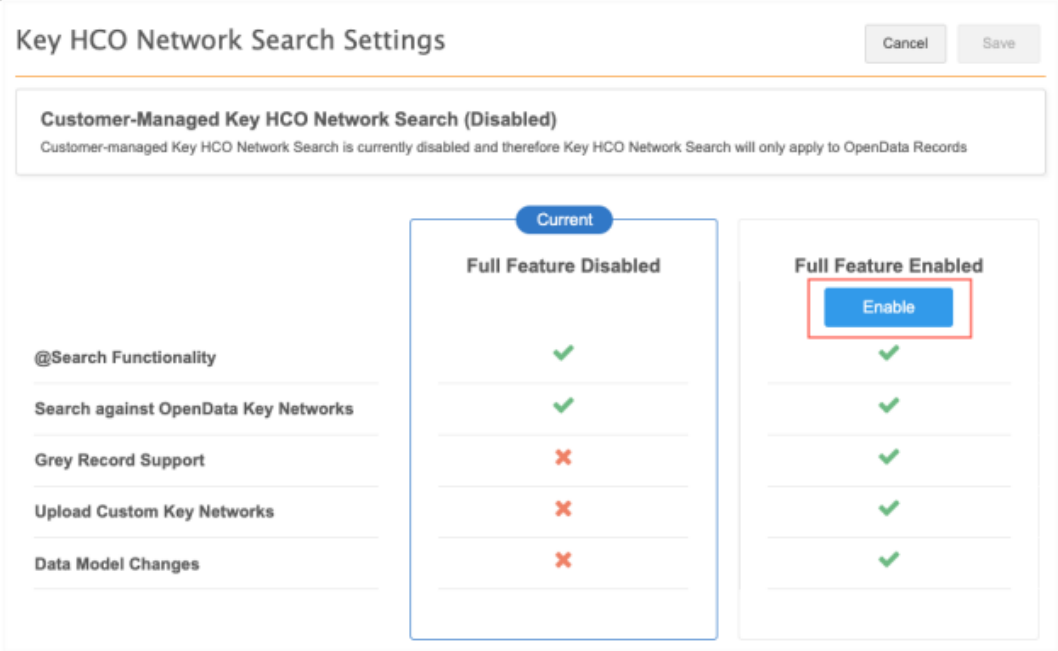
The data maintenance job combines the key HCO networks from OpenData and the local HCOs records that you have flagged. The HCOs are deduplicated during the job.

Enable the feature

1. In the Admin console, click **Data Model > Key HCO Network Search Settings**.

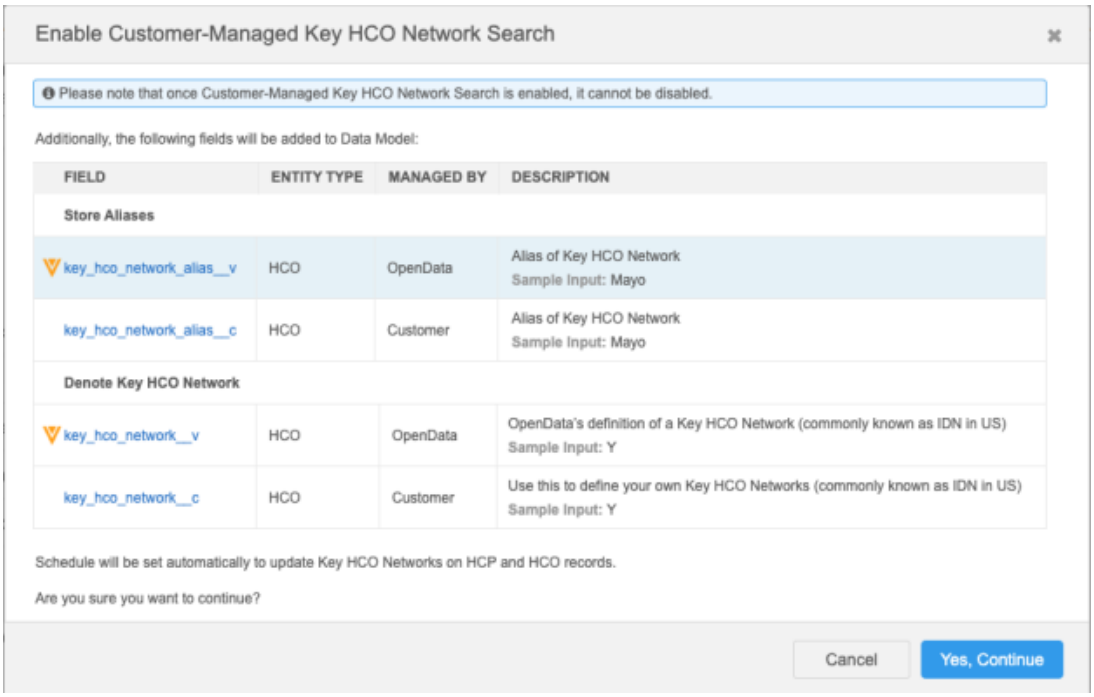
   A comparison of the key differences between the feature status displays.

2. In the **Full Feature Enabled** column, click **Enable**.



3. In the dialog, review the fields that will be added to the data model. Click **Yes, Continue**.

Note: The feature cannot be turned off after it is enabled.



The page refreshes to show that the feature is now enabled.

4. **How to Add an HCO as a Key HCO Network** - Review the details in this section for identifying locally managed HCOs as key networks for this feature.

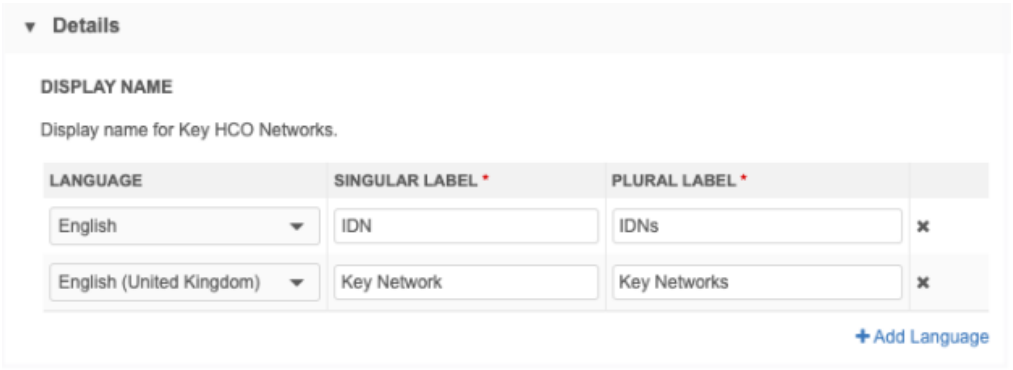
   For more information, see the "Adding key HCO networks" section below.

5. **Fields Added to Data Model** - Review the fields that are added and enabled in the data model.

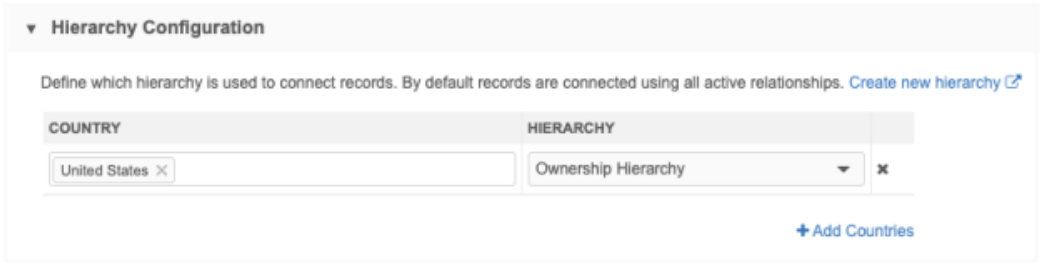
Field Name	Label (EN US)	Description
key_hco_network__v	IDN	Indicates whether the HCO is a Key Network. Also known as IDN (Integrated Delivery Network). This field is OpenData Managed.
key_hco_network_alias__v	IDN Alias	Alias for Key HCOs. This field is used for Key Network Search and is OpenData Managed.
key_hco_network__c	Customer Key Network?	Indicates whether the HCO is a Key Network by the customer. Also known as IDN (Integrated Delivery Network). This field is customer-managed.
key_hco_network_alias__c	Customer Key Network Alias	Alias for Key HCO Network/IDN defined by the customer. This field is used for Key Network/IDN Search and is Customer managed.

Note: If the feature is not enabled, the `key_hco_network__v` is visible in the Network Data Model and can be enabled. The other fields will be hidden.

6. **Details** section - Default labels are defined for key networks/IDNs. The labels can be changed to apply to your business processes.



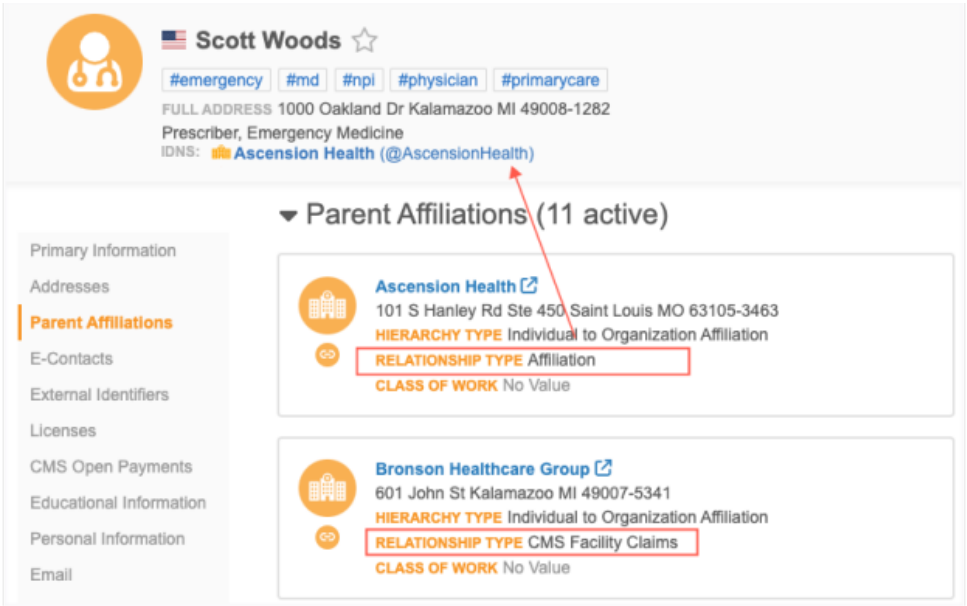
7. **Hierarchy Configuration** section - Define the hierarchy that is used to calculate the affiliated records. Choose the **Country** and **Hierarchy**.



Example

US OpenData's Ownership hierarchy applies to Ownership and Affiliation relationship types. If you define the Ownership hierarchy to connect records, only Ownership and Affiliation type relationships will be calculated as key networks.

All other relationship types (for example, CMS Facility Claims relationships) do not display as key networks in search results and on records.

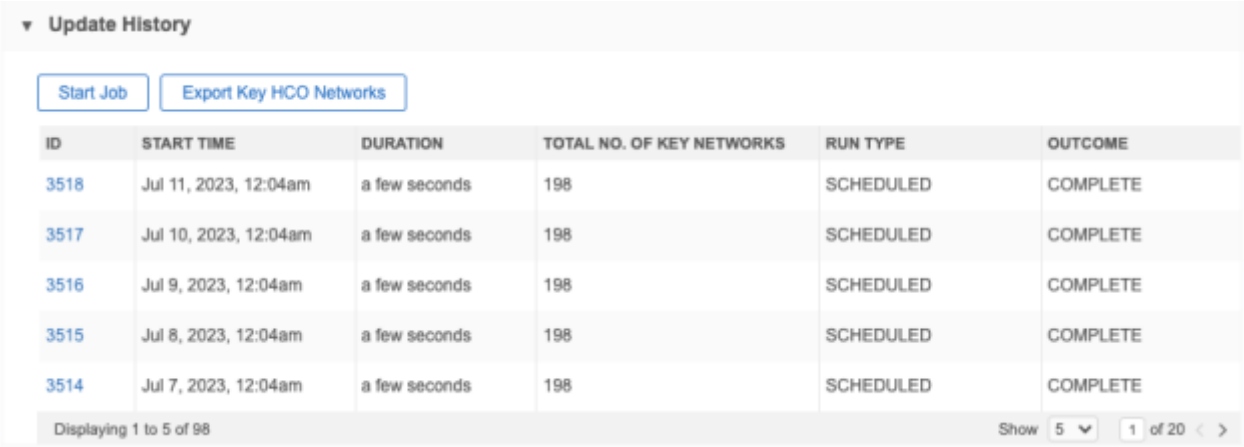


Note: If a hierarchy is not defined, affiliated records are not updated during the data maintenance job.

8. **Schedule** section - Set the schedule to update the data maintenance job.

   The data maintenance job updates the list of key networks available in your Network instance and updates the records with their affiliated networks.

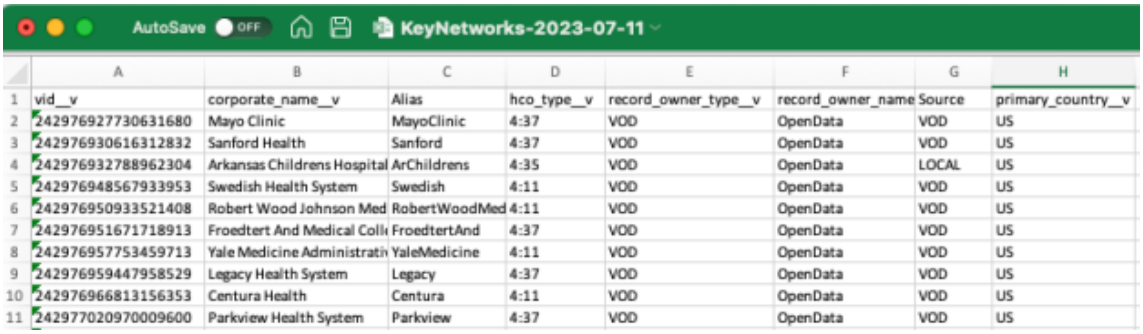
9. **Update History** section - Review information about the data maintenance jobs that have run. The table includes a count of the total key networks in the lookup table.



Available actions:

- **Start Job** - Manually start the data maintenance job.
- **Export Key HCO Networks** - Export a .xlsx file containing a list of the key networks in your Network instance. The file is downloaded with the following naming convention: `KeyNetworks-<date>.xlsx`.

  Example file



	A	B	C	D	E	F	G	H
1	vid__v	corporate_name__v	Alias	hco_type__v	record_owner_type__v	record_owner_name	Source	primary_country__v
2	242976927730631680	Mayo Clinic	MayoClinic	4:37	VOD	OpenData	VOD	US
3	242976930616312832	Sanford Health	Sanford	4:37	VOD	OpenData	VOD	US
4	242976932788962304	Arkansas Childrens Hospital	ArChildrens	4:35	VOD	OpenData	LOCAL	US
5	242976948567933953	Swedish Health System	Swedish	4:11	VOD	OpenData	VOD	US
6	242976950933521408	Robert Wood Johnson Med	RobertWoodMed	4:11	VOD	OpenData	VOD	US
7	242976951671718913	Froedtert And Medical Coll	FroedtertAnd	4:37	VOD	OpenData	VOD	US
8	242976957753459713	Yale Medicine Administrati	YaleMedicine	4:11	VOD	OpenData	VOD	US
9	242976959447958529	Legacy Health System	Legacy	4:37	VOD	OpenData	VOD	US
10	242976966813156353	Centura Health	Centura	4:11	VOD	OpenData	VOD	US
11	242977020970009600	Parkview Health System	Parkview	4:37	VOD	OpenData	VOD	US

Adding key HCO networks

When the feature is enabled, you can identify locally managed records as key networks so users can search against them and find records in the hierarchy.

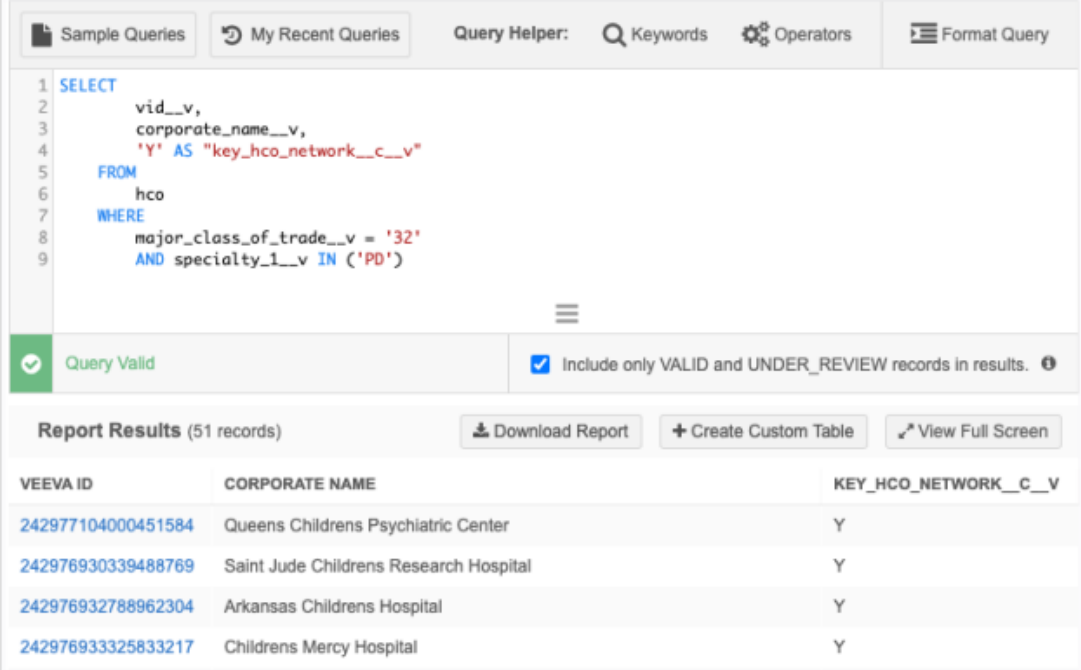
Process

- Identify HCOs to flag as key networks and add them to a file.
- Upload the file using the Data Updater.
- Run the data maintenance job.

Identify HCOs as key networks

In this example, we want to flag locally managed Children's Hospitals as key networks so we can target the accounts in their hierarchies.

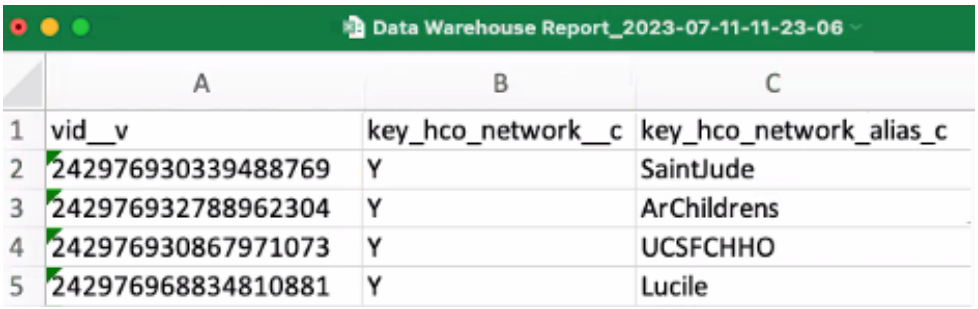
To do this, we can create a SQL query to report on the HCOs.



Tip: You could also search for the HCOs using `#pediatrics` and `#hospital` hashtags and manually create the file.

Download the results and use the data to create the file.

Example file



	A	B	C
1	vid__v	key_hco_network__c	key_hco_network_alias_c
2	242976930339488769	Y	SaintJude
3	242976932788962304	Y	ArChildrens
4	242976930867971073	Y	UCSFCHHO
5	242976968834810881	Y	Lucile

File requirements

The file must contain the following columns:

- **vid__v** - The Veeva ID of the HCO.
- **key_hco_network__c** - This field identifies the HCO as a key network. Set this column value to **Y**.
- **key_hco_network_alias__c** - The HCO alias that will be used in your Network instance.

  Example alias

HCO Corporate Name	HCO Alias
Saint Jude Children's Research Hospital	SaintJude

Upload the file

Use the Data Updater feature to load the file to Network.

1. On the Network menu bar, click **Data Updater**.
2. Click **New Data Operation** and choose **Update Records**.
3. On the **Upload File** tab, select **Health Care Organization** as the object. Define the system, indicate if the file includes third party data, and then upload the file.
4. Review the details on the **File Summary** tab.
5. Click **Update Records**.

Run the data maintenance job

By default, the data maintenance job is scheduled. Wait for the job to run, or manually run it.

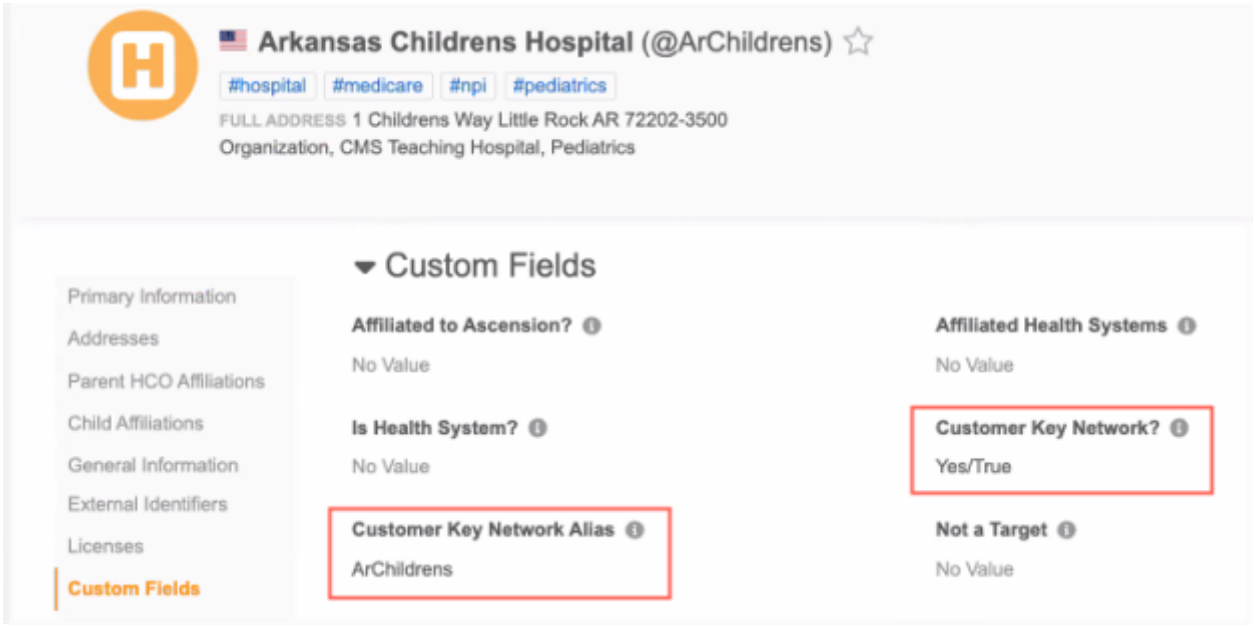
Tip: Before running the job, wait for a few minutes for the reporting database to update the records from the Data Updater job.

To run the data maintenance job:

1. In the Admin console, click **System Interfaces > Key HCO Network Search Settings**.
2. Click **Start Job**.
3. The **Update History** section displays the details of the job when the job completes.
4. Click **Export Key HCO Networks** to download the list of HCOs that are flagged as key networks. Verify that the HCOs that you flagged are included in the list.

After the data maintenance job runs, users can search against the key network to find HCPs and HCOs in that hierarchy.

HCOs that you have identified as a key network display the alias beside the HCO name and the custom fields and values on the record profile.



About the data maintenance job

A new data maintenance job `key_hco_network_maintenance__v` is added to your Network instance to support this feature. This is a Network internal job; it does not display on the Data Maintenance Subscriptions page (**System Interfaces**).

If the Key HCO Network Search feature is not enabled, the data maintenance job runs daily on a daily schedule to add key networks from OpenData. You can view and export the details of the job, including the count of key networks that were added and the HCP and HCO records that were updated.

When the feature is enabled, the data maintenance job does the following actions:

- Generates the list of key networks available to users in Network.

  The HCOs in the list are retrieved from:

  - key networks flagged from each OpenData instance for the countries you subscribe to
  - HCO records that you have flagged as key networks in your Network instance

  The HCOs are combined and deduplicated during the job.
- Updates record profiles with associated Networks.

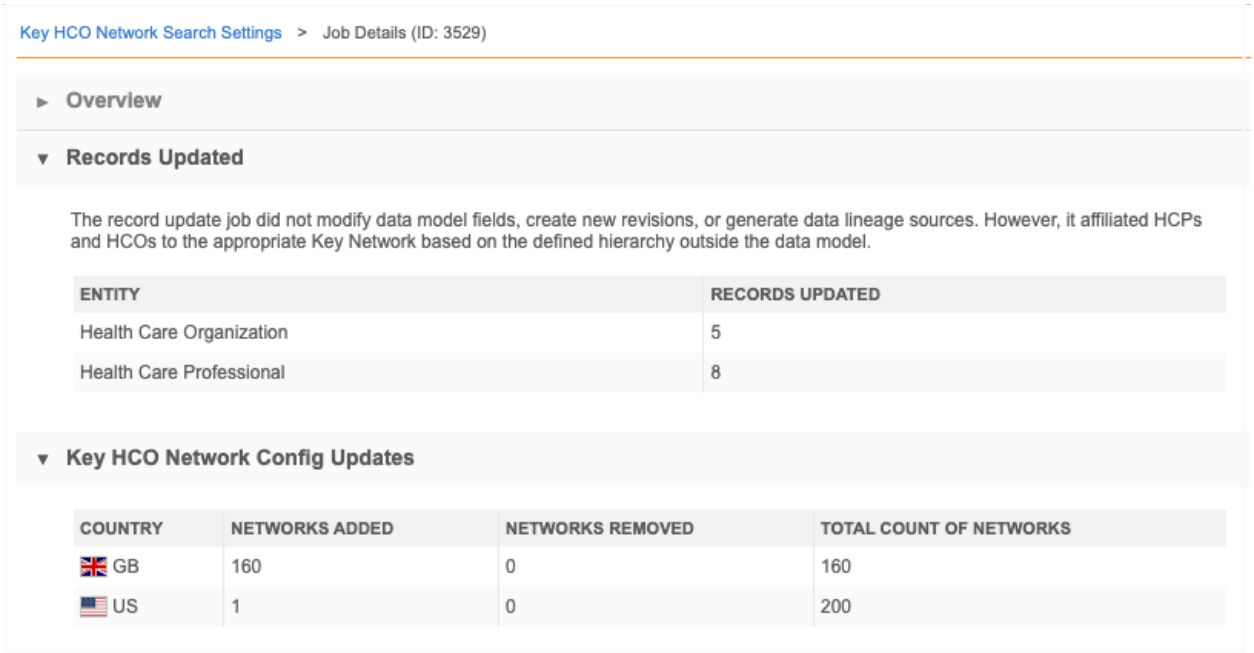
The lookup table can contain a maximum of 10,000 rows. If there are now than 10,000 rows in the file, all extra rows are removed.

Job details

To view details about a data maintenance job that ran:

1. Open the Key HCO Network Search Settings page (**Data Model**).
2. In the **Update History** section, click the **ID** to view the Job Details page.
3. Review the key networks that were added and the records that were updated with the affiliated key network.

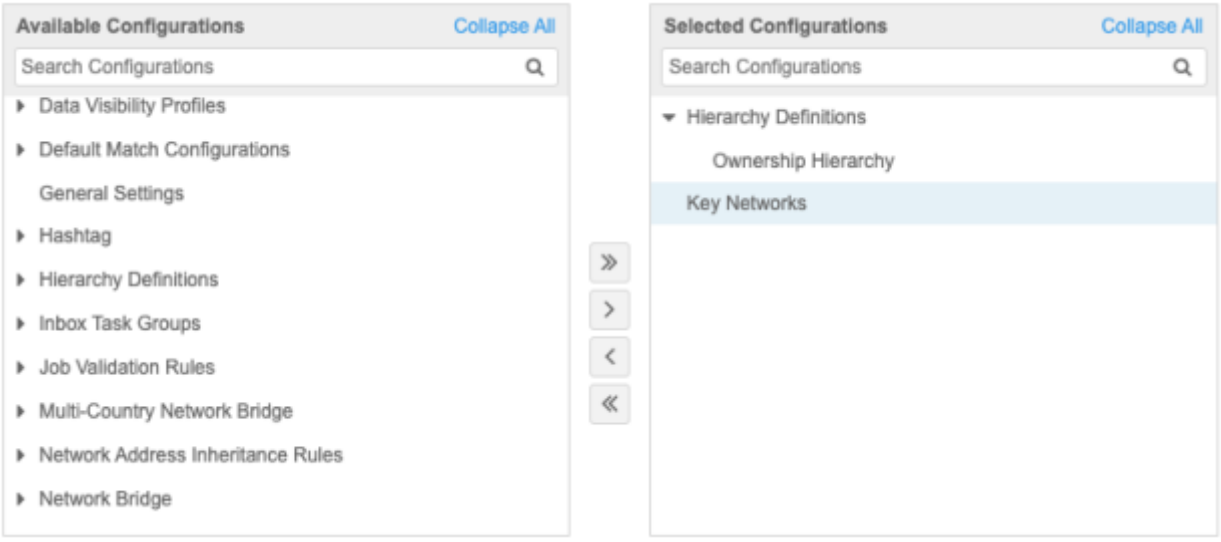
   Note: Records are updated outside of the data model. Associations to key networks do not modify fields, create revisions, or generate data lineage sources. The size of target subscription or Network Bridge jobs are not affected by this data maintenance job.



Exporting configurations

When the Key HCO Network Search feature is enabled, you can export the configuration to a target environment.

A new node called **Key Networks** is added to the **Available Configurations** pane. If you move the node to the **Selected Configurations** pane, any hierarchies that you added to the Key HCO Network Search are added as dependencies.



Logs

Administrators can track searches that use the **@** symbol in the Search Audit History. Changes to the Key HCO Network Search feature are tracked in the System Audit History.

Network hashtags

TELEHEALTH HASHTAG

23R2

A new hashtag is available to help you find HCPs in the United States that offer telehealth services.

Hashtag	Countries	Tooltip
#telehealth	United States	This HCP offers telehealth services.

The hashtag rule uses the new data model field, `telehealth__v`. You can use the field to flag US HCPs that offer telehealth services.

This hashtags are enabled by default in your Network instance.

Profiles

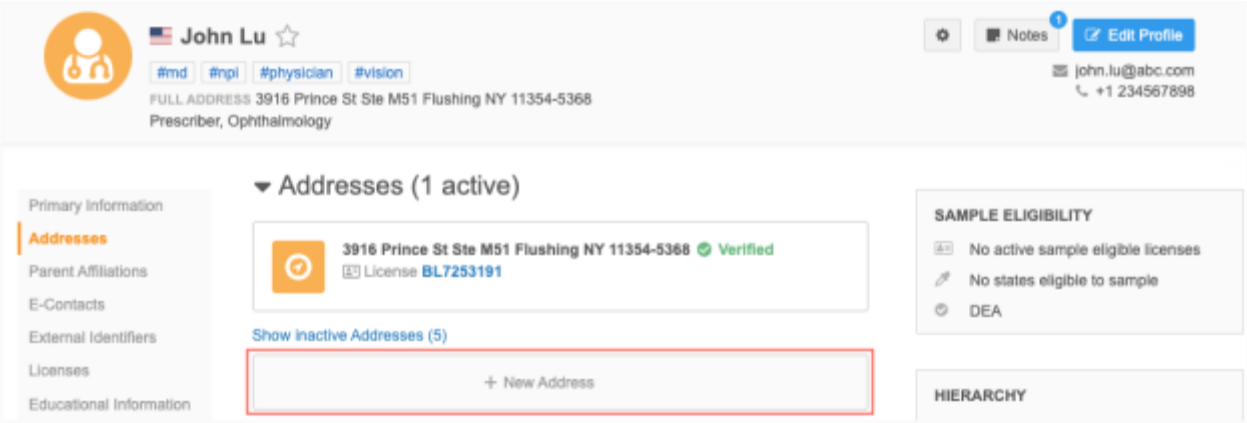
ADDING SUB-OBJECTS IN READ-ONLY MODE

23R2

The **New** sub-object button now displays when the Profile page is in read-only mode. Users with edit access can view the button in each sub-object section. Previously, users had to click on **Edit Profile** to add a sub-object.

When you click the **New** button, the Profile page automatically toggles to edit mode so you can add the sub-object and make any other changes on the record.

Note: Only users with edit access can add sub-objects and make changes to records.



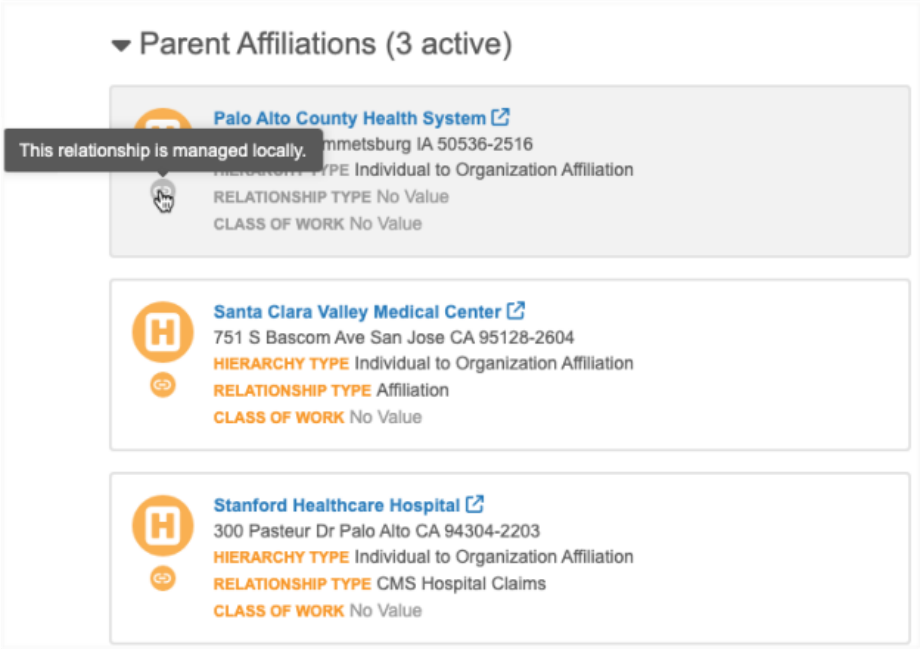
This enhancement is enabled by default in your Network instance.

RECORD OWNER FOR RELATIONSHIPS

23R1.1

Relationship objects now contain Affiliation badges to identify if the relationship is locally managed, managed by OpenData, or managed by a third party data provider.

This is helpful for understanding who owns the affiliation data for troubleshooting purposes.



This enhancement is enabled by default in your Network instance.

Supported objects

Affiliation badges are supported for Veeva relationship objects (Parent HCOs) and custom relationship objects.

Badges on Veeva relationship objects

Badges display below the HCO icon on **Parent Affiliation** and **Child Affiliation** summary cards on the Profile page and on profile previews.

The badges indicate the following:

- **Record owner** - The badge color identifies the relationship owner.
  - Gray - Locally managed records when the user's locale is not set to China.
  - Green - Locally managed records when the user's locale is set to China.
  - Orange - Veeva OpenData managed records.
  - Blue - Third-party managed records.

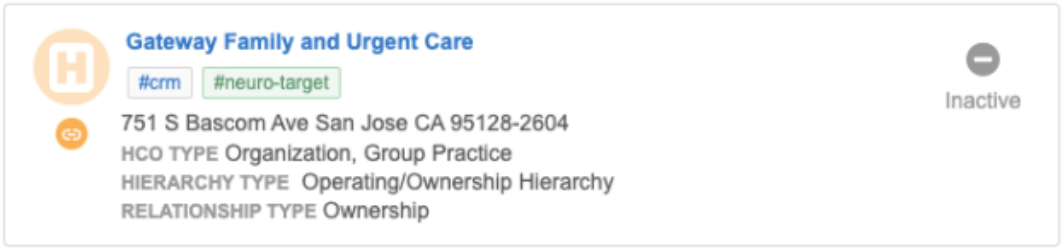
- **Relationship status and state** - The badge is dimmed if the relationship status (parent_hco_status__v) is not Active or the relationship record state (record_state__v) is not Valid or Under Review.

  Related entity

  The record state and status of related entity (HCO) can be different from the relationship's state and status.

  Example

  The related entity in this parent affiliation is inactive, but the relationship is active and valid. In this case, only the HCO icon is dimmed.



Tip: When the **Inactive** badge displays on summary cards, it identifies that either the related entity or the relationship is not active.

Examples of badges

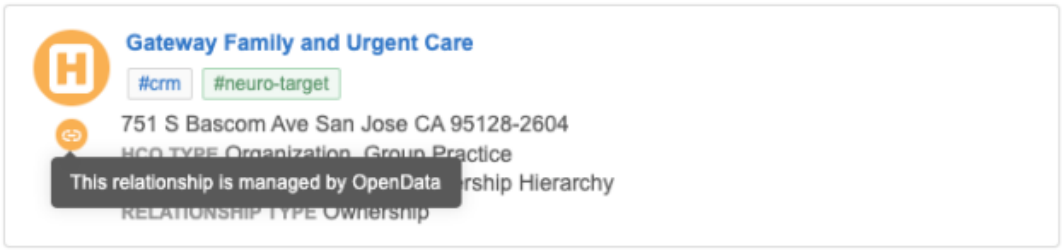
In these examples, the related entity (HCO) is managed by Veeva OpenData and the Parent HCO relationship is locally managed.

Related Entity	**Relationship**	**Object Icon and Affiliation Badge**
Record status = Active and Record state = Valid/Under Review	Relationship status = Active and Record state = Valid/Under Review	
Record status = Active and Record state = Valid/Under Review	Relationship status = not Active or Record State = not Valid/Under Review	
Record status = not Active or Record State = not Valid/Under Review	Relationship status = Active and Record state = Valid/Under Review	
Record status = not Active or Record State = not Valid/Under Review	Relationship status = not Active or Record State = not Valid/Under Review	

Tooltips

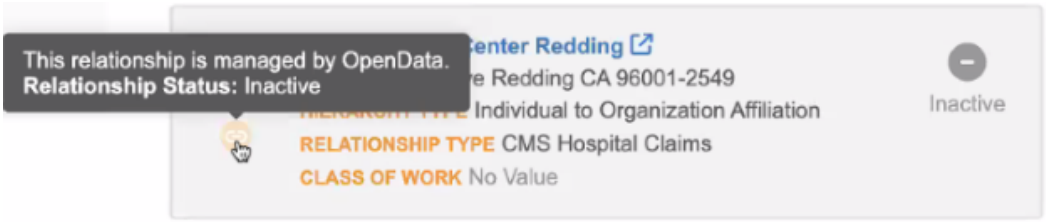
Relationship owner

Hover over the badge to quickly understand the owner of the relationship.



Relationship status and state

If the relationship is not Active or is not Valid/Under Review, the tooltip explains why the Affiliation badge is dimmed.

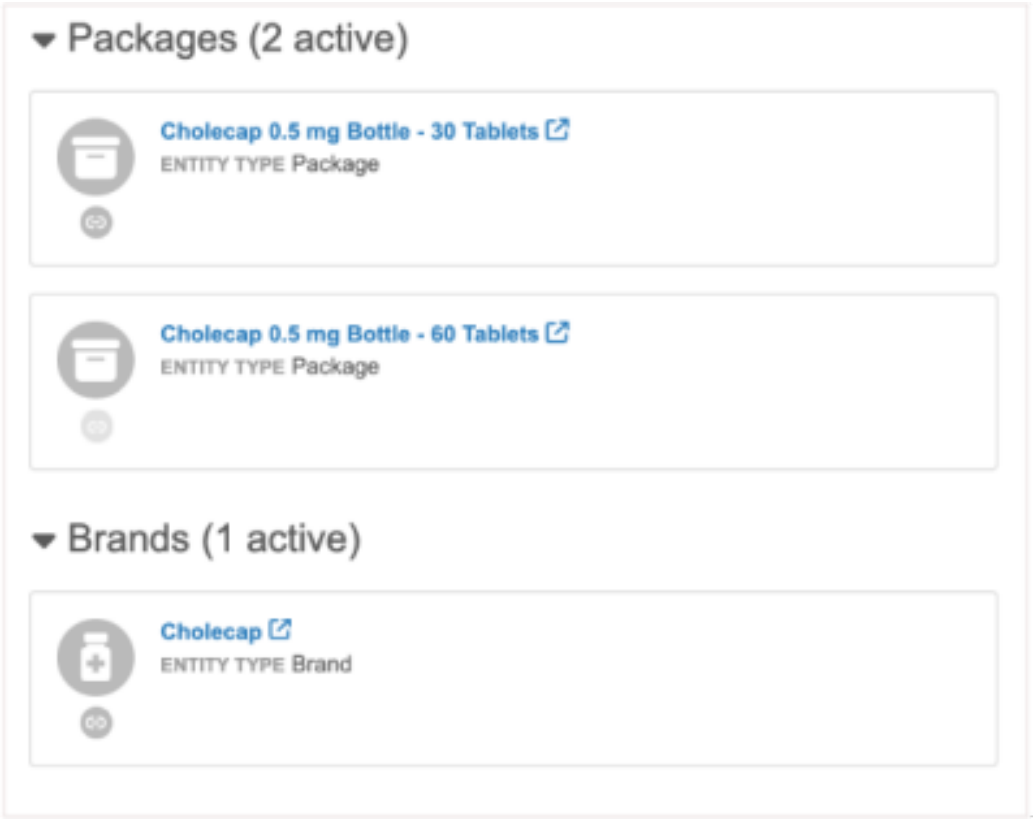


The relationship state or status does not display in the tooltip if the relationship is Active and Valid/Under Review.

Badges on custom relationship objects

Custom object relationships are always managed locally. The Affiliation badge displays below the custom object icon. It can help you to easily identify which objects on the Profile page are relationship objects.

You can also use the badge to identify which relationships are not Active or Valid/Under Review.



SEND TO OPENDATA

23R1.1

Add requests that are sent to OpenData now retain the default message, `OpenData Takeover Request`, in the Requester Notes.

Local Data Stewards can add comments to the Requester Notes to help OpenData verify the add request. Comments are now appended after the default message so OpenData Data Stewards can easily identify these types of requests.

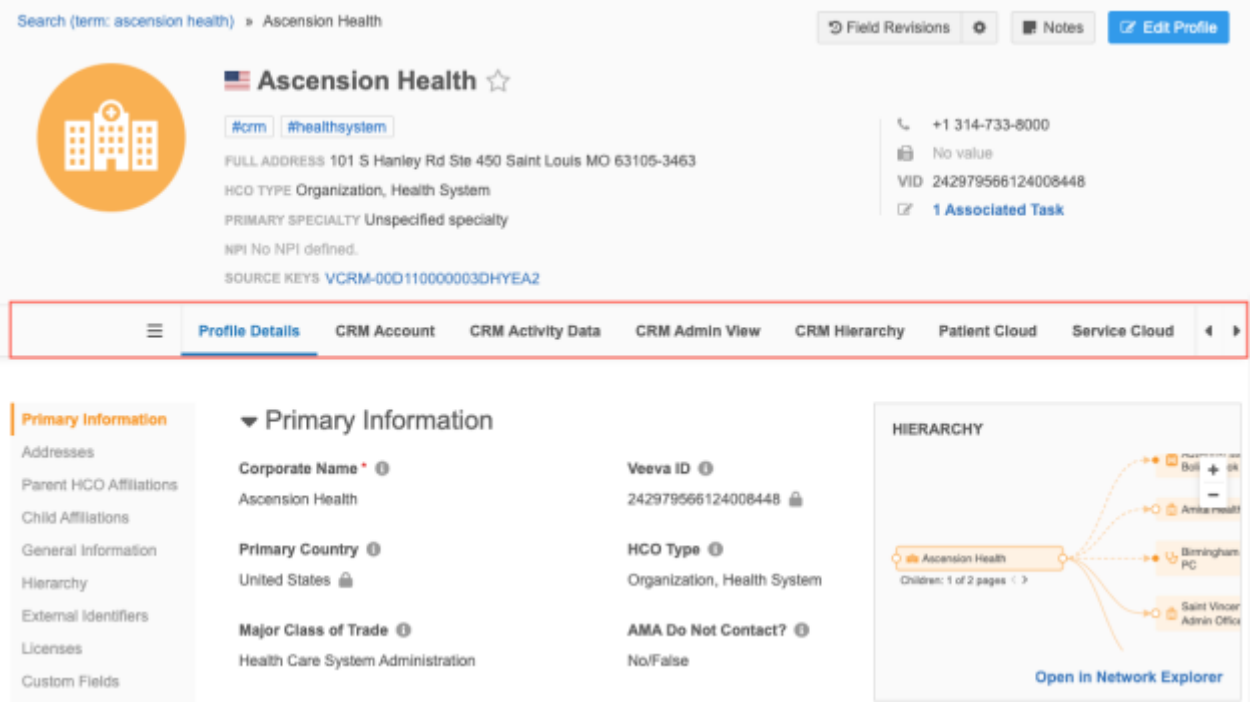
This enhancement is enabled by default in your Network instance.

Data components

DATA COMPONENTS ON RECORD PROFILES

23R2

Data components now display as tabs on record profiles so you can quickly access all relevant data and understand the complete view of a record.



This enhancement is enabled by default in your Network instance. Existing data components that were previously available through the button on the Profile page, now display as tabs.

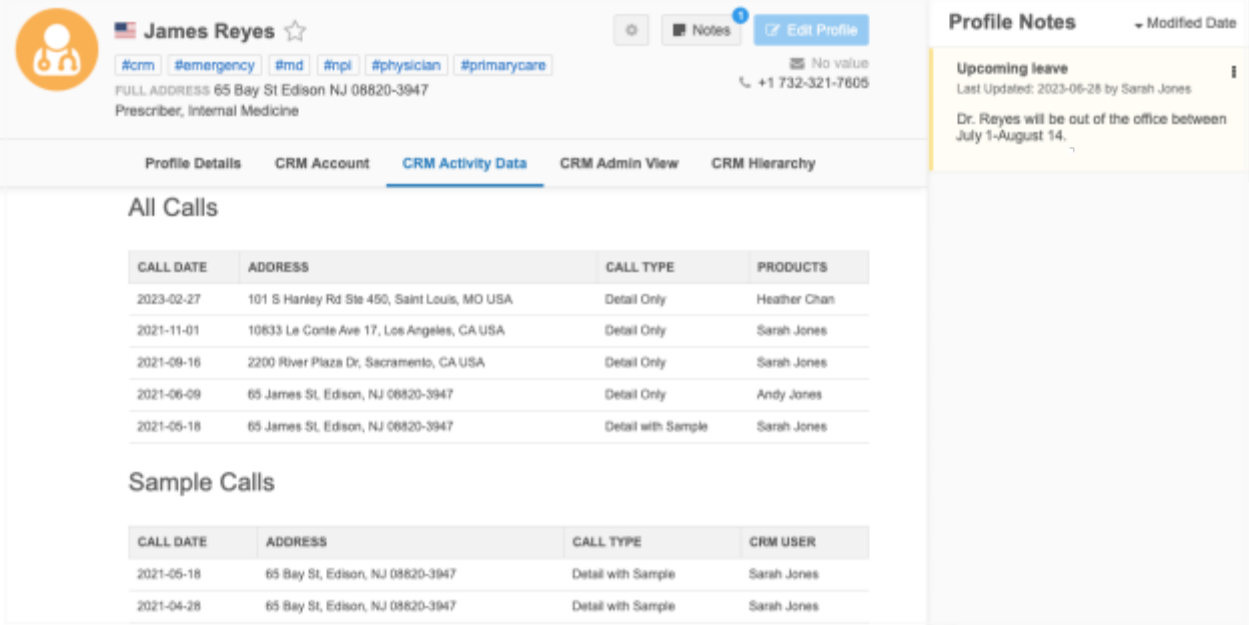
Note: If data components do not apply to a record (based on the permissions defined in the data component configuration), tabs do not display on the Profile page.

View data components

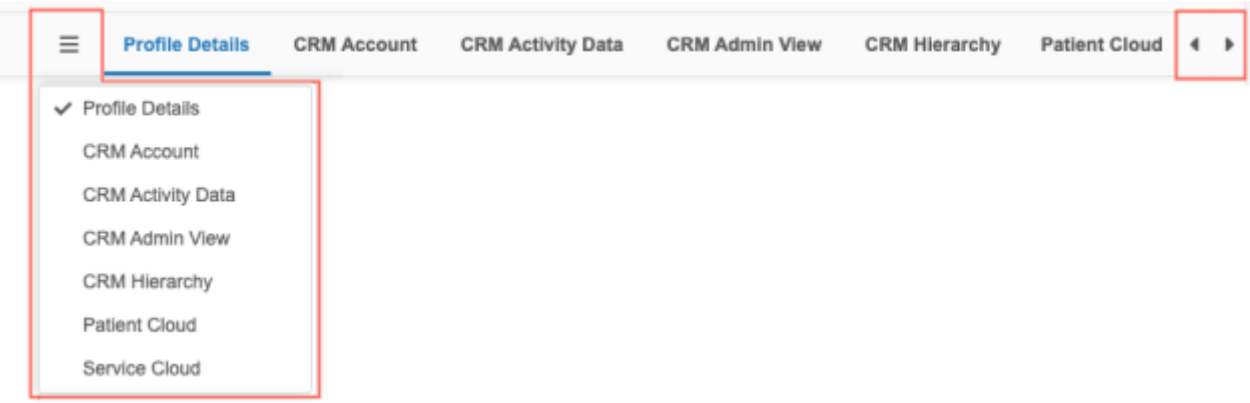
Administrators create data components using queries to access Salesforce or Network reporting data. The data component names are defined by Admins. This process for creating data components has not changed. For more information, see Creating data components in the *Veeva Network Online Help*.

To view a data component, click the tab name.

The tab name is highlighted and the external data displays on the profile page.



If there are many data component tabs, use the arrows to scroll through the tabs or click the **Menu** icon to select a data component from the list.



To return to the Network record information, click the **Profile Details** tab.

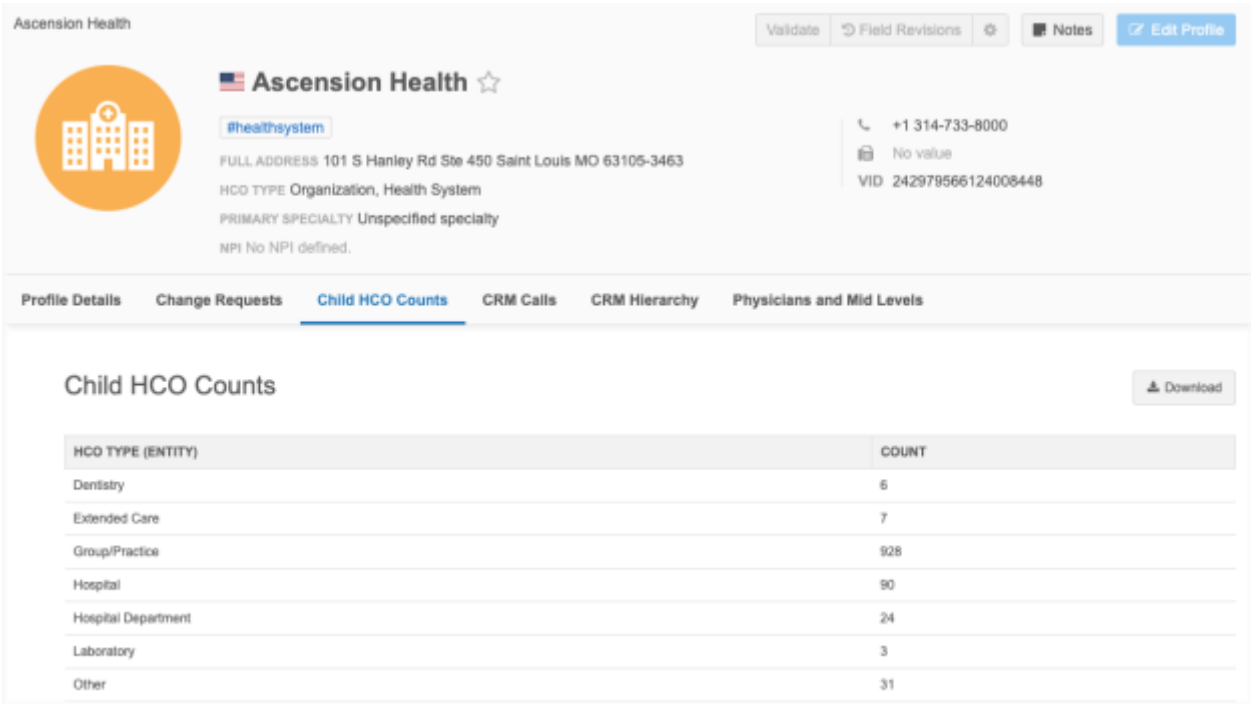
Note: The record is not editable when you are viewing a data component, but you can view the **Notes** pane. Return to the **Profile Details** tab to edit the record. Data components are read-only.

NETWORK REPORTING DATA

23R2

Data components can be created for reporting data so you can see all related Network data (for example, change request and sub-object data) on profile pages in order to make decisions. For example, you can see all the change request data for the record to help troubleshoot discrepancies.

When you open the data component, the report results are dynamically retrieved and displayed for the record that you are viewing.



Reporting data component support

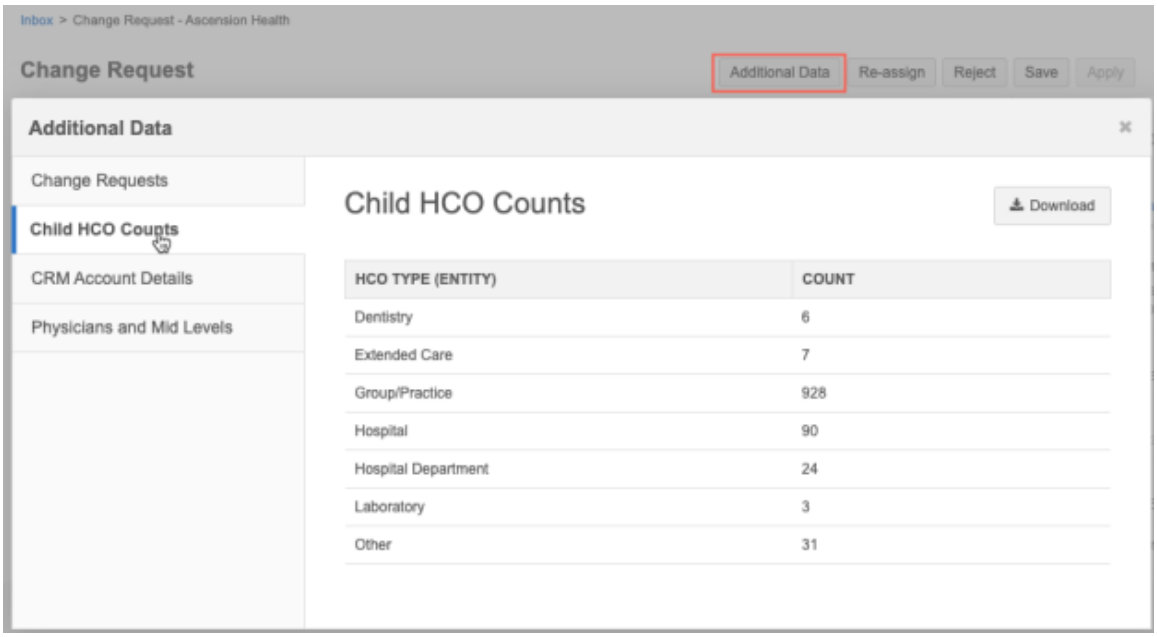
When a data component is created, administrators define where each data component will display.

Data components are available in the following features:

- **Network UI** - Profile page, add requests, and change requests

  Example - DCR page

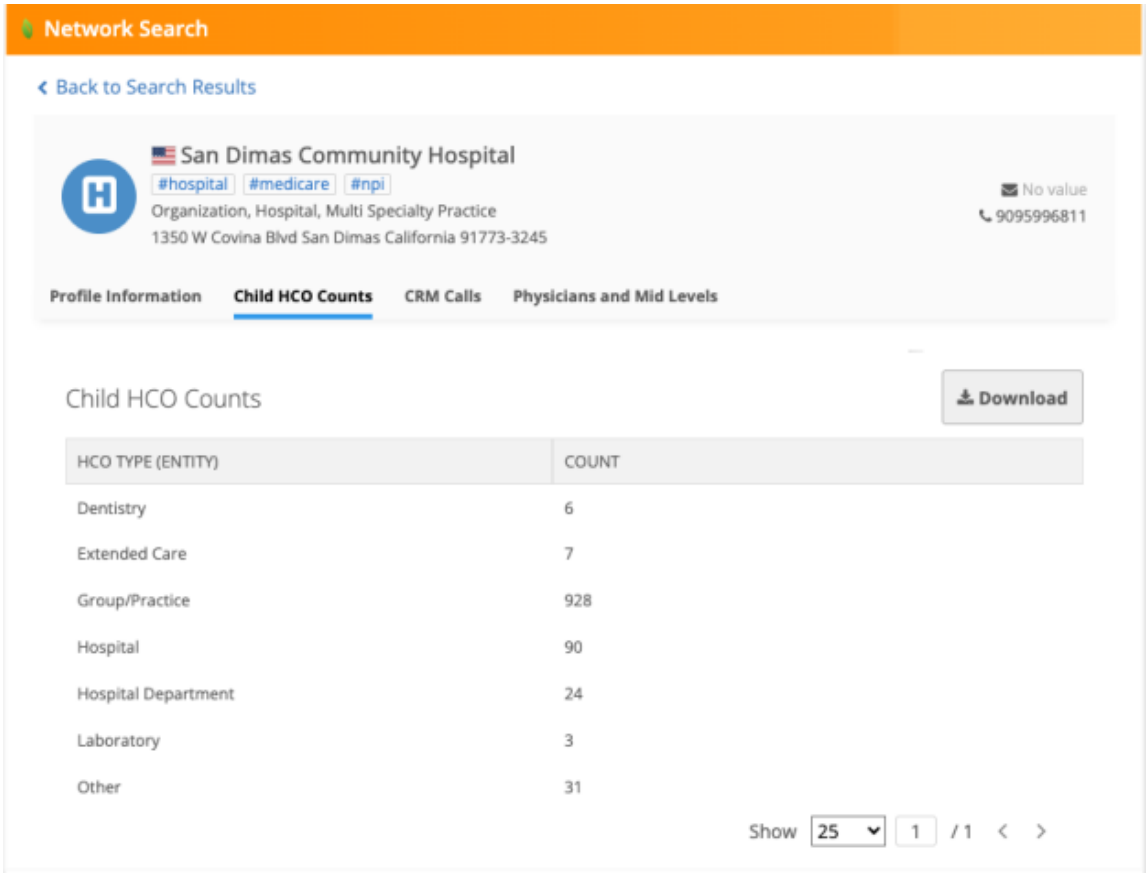
  Click the data component button beside the task actions to open the dialog. The button name is defined by your Network administrator.



- **Network widgets** - Affiliation widget, Profile widget, Search widget

  Example - Search widget

  If data components are available, the tabs display beside **Profile Information**.



Download data

Use the **Download** button to download the results for reporting data components.

A maximum of 1000 rows can display in the data component. If the results contain more than 1000 rows, click **Download** to view all of the results.

Viewing data components

Administrators define the users that can view data component tabs. The reporting data available in each data component depends on your individual user permissions (for example, inbox task groups, data visibility profiles, and reporting permissions). If you do not have access to the data through your user permissions, the report results do not display. Permissions for reporting data components work the same as permissions for Network Reports.

For example, you cannot view change request data in a data component if you do not have access to the `change_request` reporting table through your user permissions (inbox task group).

Network Portal users

Reporting permissions are provided to Portal users so they can view the reporting data in data components in the Network widgets. Portal users do not have access to the Network UI.

Records in OpenData instances

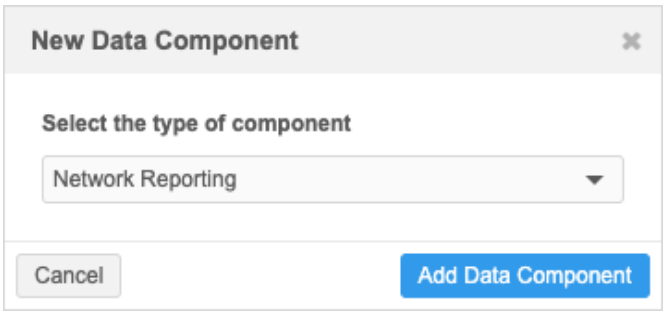
Data components display on OpenData records that have not yet been downloaded to your Network instance. To view data for these records, you can create separate data components that use OpenData reporting tables in the query.

Add a reporting data component

Use SQL queries to create a reporting data component.

To create a data component:

1. In the Admin console, click **Widgets & Portal > Data Components**.
2. Click **Add Data Component**.
3. In the **New Data Component** dialog, select **Network Reporting**. Click **Add Data Component**.

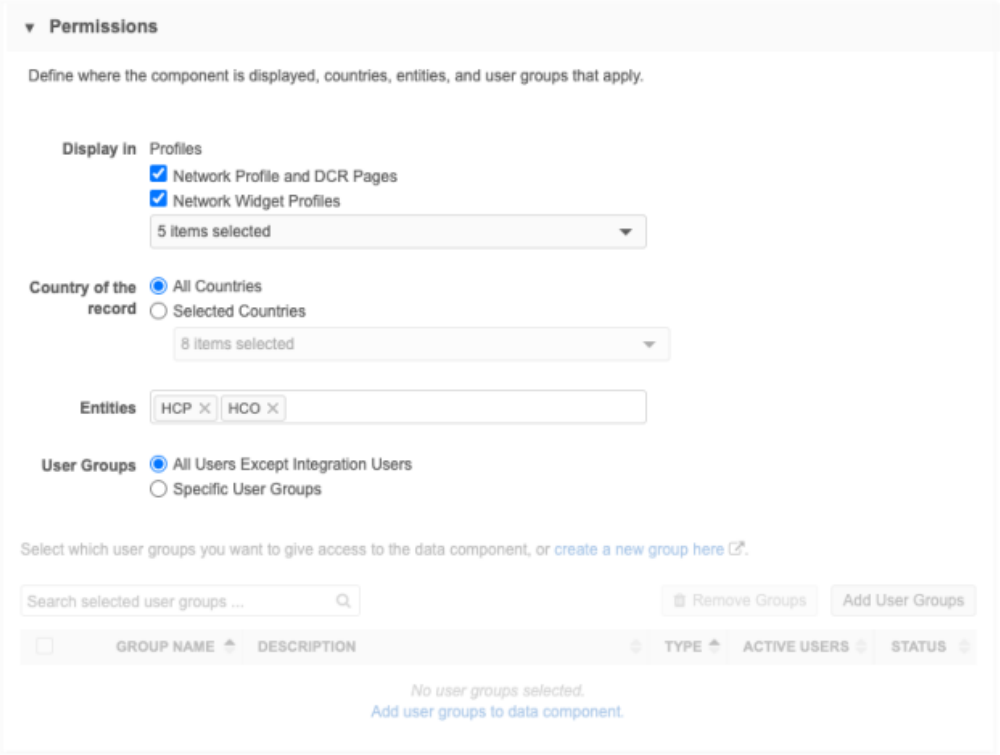


On the New Data Component page, define the following settings.

4. **Details** section - Define the following:
    - **Name** and **Description** - The name must be unique across all Network Reporting and Salesforce type data components.
    - **System** - Choose the system that this component applies to.
    - **Status** - By default the data component is enabled.
5. **Permissions** section - Define where the data component will display and the countries, entities, and user groups that apply.
    - **Display in** - Identify where you want the data component to display:
        - **Network Profile and DCR pages** - In the Network UI on record profiles and data change requests.
        - **Network Widget Profiles** - Select the widgets. Data components are supported for Affiliation widgets, Profile widgets, and Search widgets.
        - **Country of the record** - Choose which countries will apply to the data component
            - **All countries** - All countries that are available in your Network instance (Default).

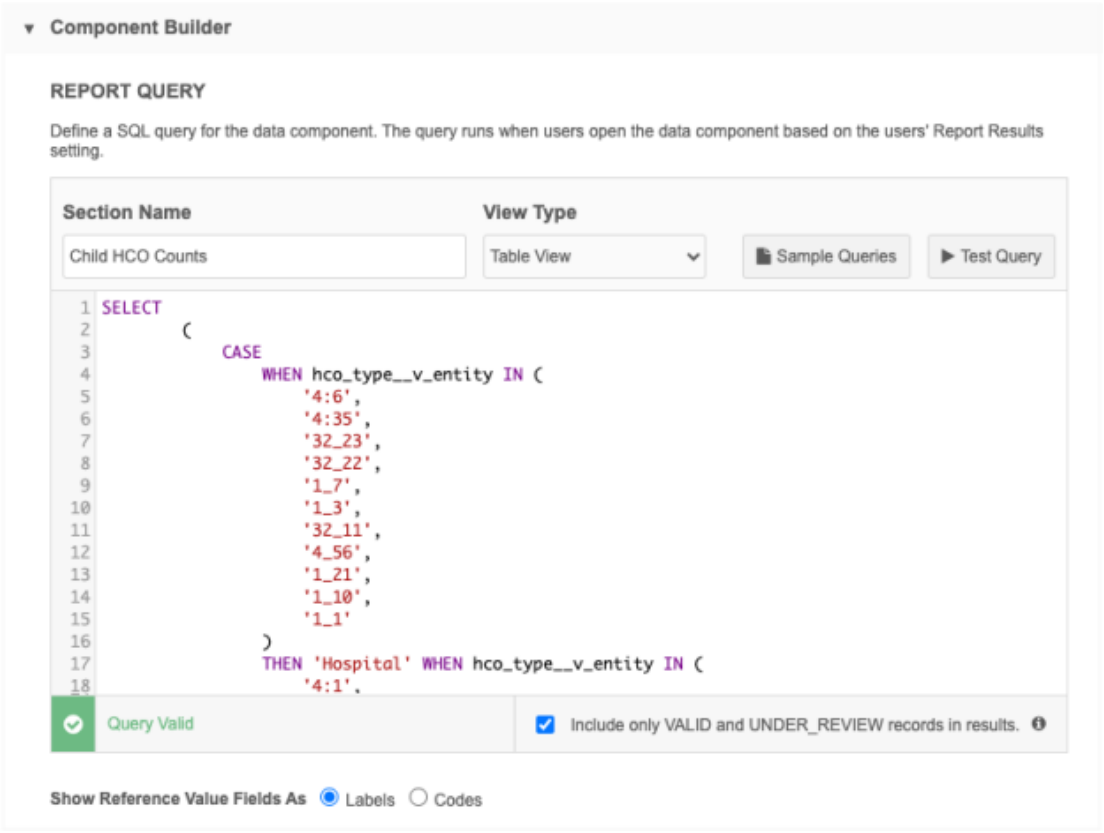
              All countries display in the list; the list is not filtered by user permissions.
            - **Selected Countries** - Select the countries that the data component applies to.
        - **Entities** - Select the entities this data component supports. All enabled main objects in your Network instance display in the list.
        - **User Groups** - Choose the user groups that can view the data component tab.

          Note: Viewing the data in the data component depends on individual user permissions (for example, inbox task groups, data visibility profiles, and reporting permissions).



6. In the **Component Builder** section, create a SQL query for the data component.

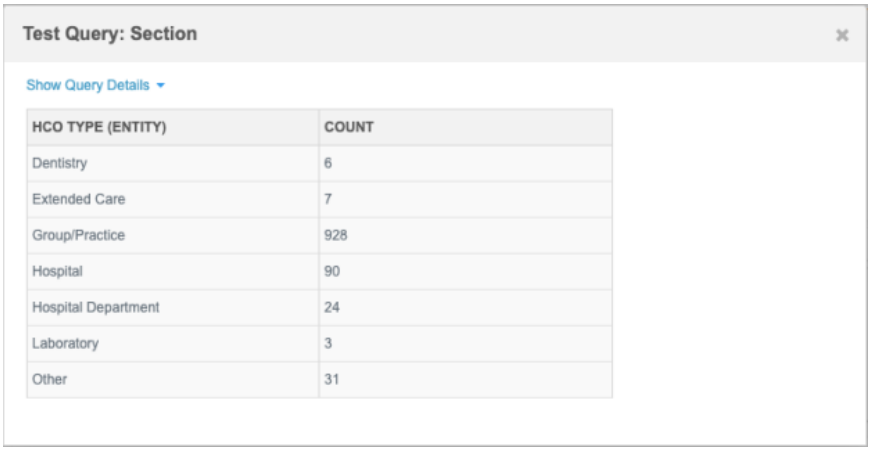
   As you type your query, an icon displays in the lower left indicating whether or not the query is valid.



Define the following settings and options for each data component:

- **Section Name** - The name that will display for the data component.
- **View Type** - Choose how the data displays in the data component.
  - **Table View** (Default) - Use when the data component will display multiple values in a table.

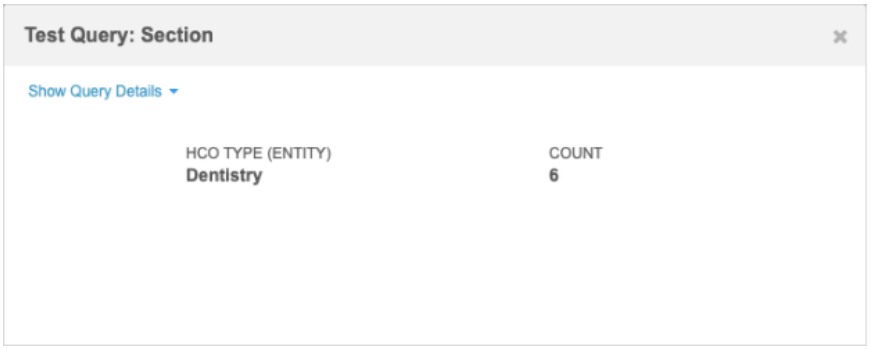
    Example - Child HCO Counts query results



- **Details View** - Use to display only one result in a two-column display.

  Example - Child HCO Counts query results

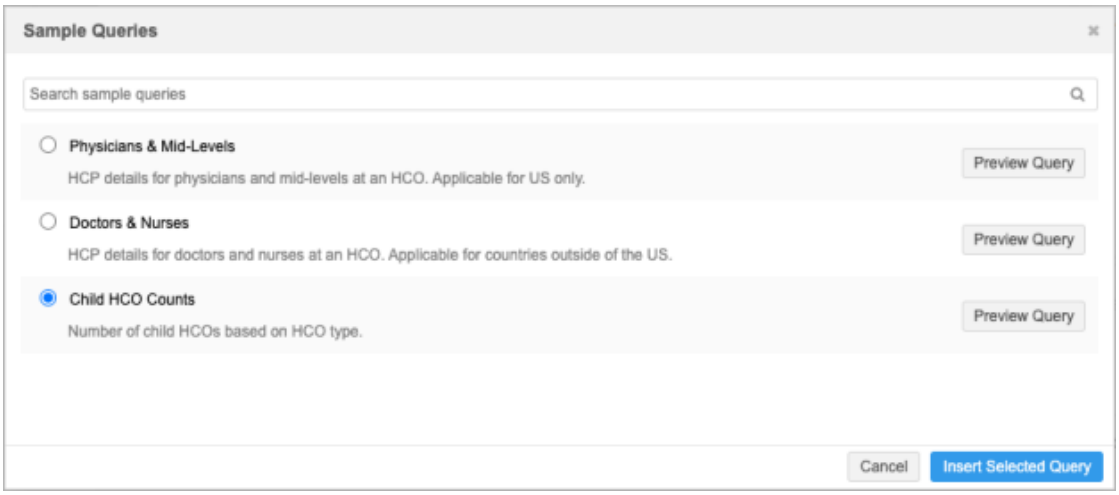
  Using the same query, only the first result displays.



- **Show Reference Value Fields As** - Choose to show reference values as **Labels** or **Codes** in the data component.
- **Include only Valid and UNDER_REVIEW records in results** - Enabled by default for new data components. Clear the setting if you want to view all records in the results.
- **Sample queries** - Use a sample query for the data component.

  The following queries are available:

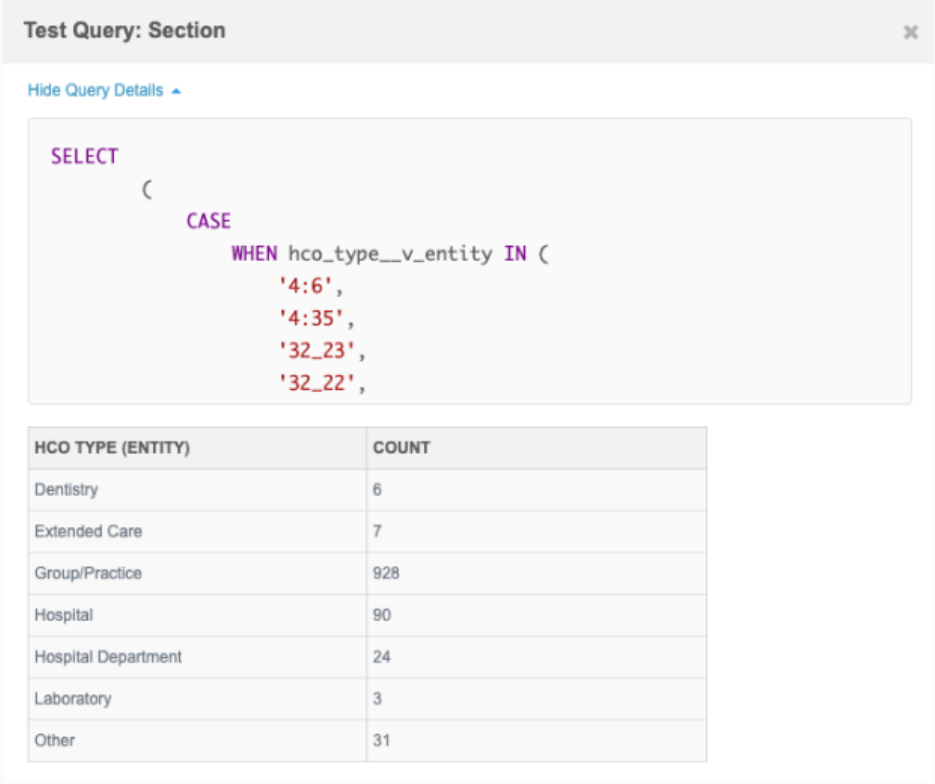
  - **Physicians & Mid-Levels** - HCP details for physicians and mid-levels at an HCO. Applicable for US records only.
  - **Doctors & Nurses** - HCP details for doctors and nurses at an HCO. Applicable for countries outside of the US.
  - **Child HCO Counts** - Number of child HCOs based on HCO type.



Preview the query or select it and click **Insert Selected Query** into the query box in the data component.

- **Test query** - Type a Veeva ID (VID) to review results for the query. The query and results for that record display.

Note: User permissions are applied to the Admin or Data Manager user that is testing the query. For example, if you do not have access to records in France through your data visibility profile and you try to test the data component with a VID of an HCO in France, you will see a message that there is no record with this Veeva ID.



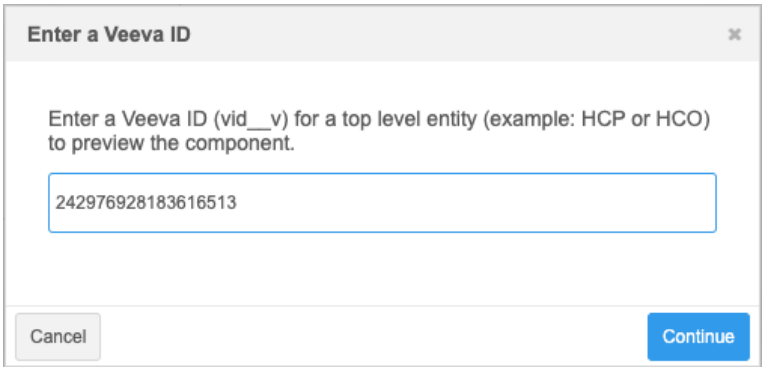
HCO TYPE (ENTITY)	COUNT
Dentistry	6
Extended Care	7
Group/Practice	928
Hospital	90
Hospital Department	24
Laboratory	3
Other	31

7. **Save** the data component.

Preview data component

After a data component configuration is saved, you can preview the data that can display.

1. Click **Preview Component**
2. In the dialog, add the Veeva ID of an HCP, HCO, or custom object record.



3. Click **Continue**.

   The data component displays with the data returned from the report.

Note: User permissions are applied to the Admin or Data Manager user that is testing the query. For example, if you do not have access to records in France through your data visibility profile and you try to test the data component with a VID of an HCO in France, you will see a message that there is no record with this Veeva ID.

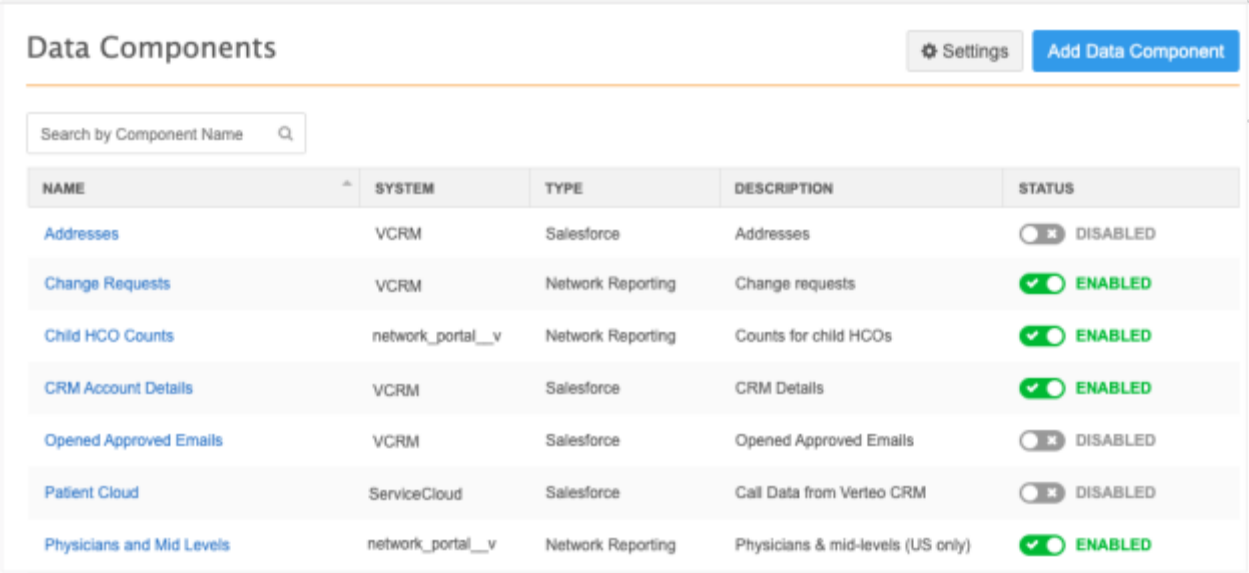
Clone a reporting data component

To create a reporting data component that is similar to another data component, you can clone an existing data component.

1. In a data component configuration, click **Clone**.
2. A New Data Component page displays with all of the settings and the same report query of the existing data component.
3. Type a **Name** for this data component and make any required changes to the settings.
4. Click **Save**.

Data components view

On the Data Components page, the **Networking Reporting** type identifies the data components that display report data.



Use SQL query variables

When you create a SQL query for a data component, use variable syntax to make the results of the query relevant to each profile. The variables are fields on the entity.

Example

```
vid__v =:vid__v
```

or

```
ancestor_vid__v =:vid__v
```

When the data component is opened on a profile, the variable is swapped with the Veeva ID of that record.

```
vid__v =243243646072128514
```

Use the following syntax to use LIKE in a WHERE clause with a variable:

```
WHERE vid_key like concat('%', :vid__v)
```

Logs

Administrators can use the System Audit Log to see when new data components are created.

Data model

The following data model enhancements have been added in this release.

CLUSTER MANAGEMENT

23R2

Customers can enrich addresses for additional providers and countries by adding cluster codes.

In this release, Network has included support for the following country/third party cluster provider combination:

- South Korea - IQVIA™

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

NEX FUNCTION

23R2

Administrators can use the new `STRINGSORT` function in Network Expression rules for data model fields and in source subscriptions.

This new function is available by default in your Network instance.

STRINGSORT function

Returns a collection of elements based on the defined sort order.

```
STRINGSORT(collection, sortOptions)
```

Parameters

- collection (for example, `['Z', 'a', 'b']`)
- sortOptions - `asc` (default) or `desc`

Null elements are ignored. String sort is not case-sensitive.

Example 1

```
STRINGSORT(['CA', 'co', 'WA', 'DEA', null, 'NY'], 'asc')
```

Returns: `[CA, co, DEA, NY, WA]`

Example 2

specialty	product	restriction
CD	Cholecap	Allow
ON	Cholecap	Restrict
CD	Restolar	Restrict
ON	Restolar	Restrict

```
STRINGSORT(LOOKUPN('spec_matrix__t', 'product', 500, specialty:
specialty_1__v, restriction: 'Restrict'),'desc')
```

Returns (for Oncology HCPs): `['Restolar', 'Cholecap']`

FORMATTED NAME

23R2

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

This update is enabled by default in your Network instance.

New name calculation

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

```
last_name__v + middle_name__v + first_name__v
```

Previously, the name calculation was the following:

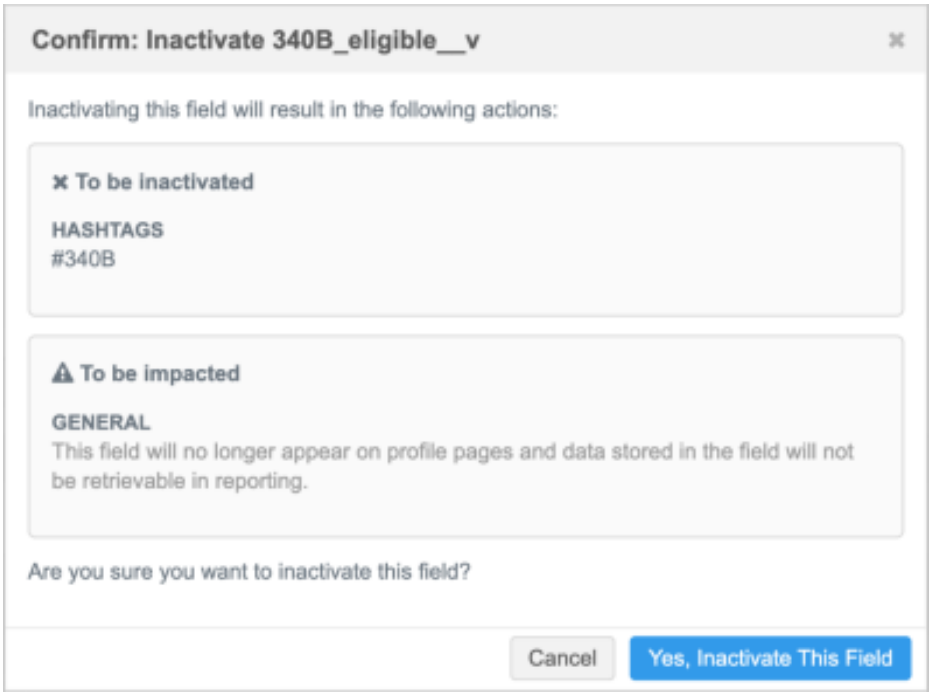
```
last_name__v + first_name__v
```

The formatted name displays on the profile page.

INACTIVATING FIELDS

23R1.1

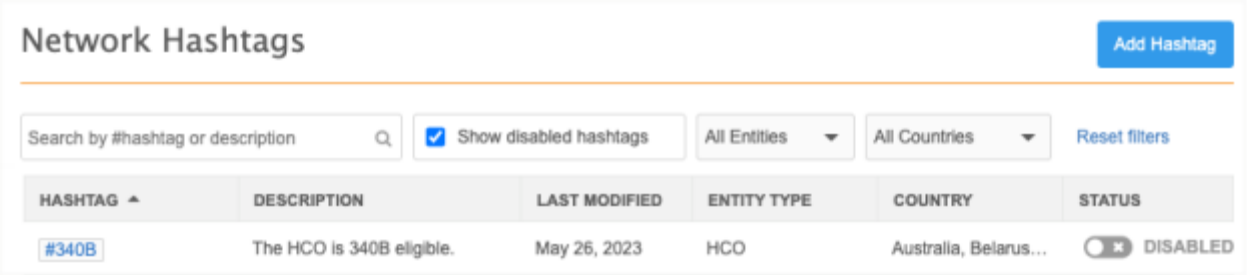
Inactivating a data model field can impact Network hashtags. If the field is used in hashtag rules, those hashtags will also be inactivated. To ensure that Administrators and Data Managers are aware that hashtags will be inactivated, the list of affected hashtags displays in the confirmation dialog before a field is inactivated.



This enhancement is enabled by default in your Network instance.

Inactivated hashtags

When a field is inactivated, hashtags that use the field in a rule are also inactivated and the modified date for those hashtags is updated (**Data Model > Network Hashtags**).



Transformation queries

SOURCE VIEW DATA

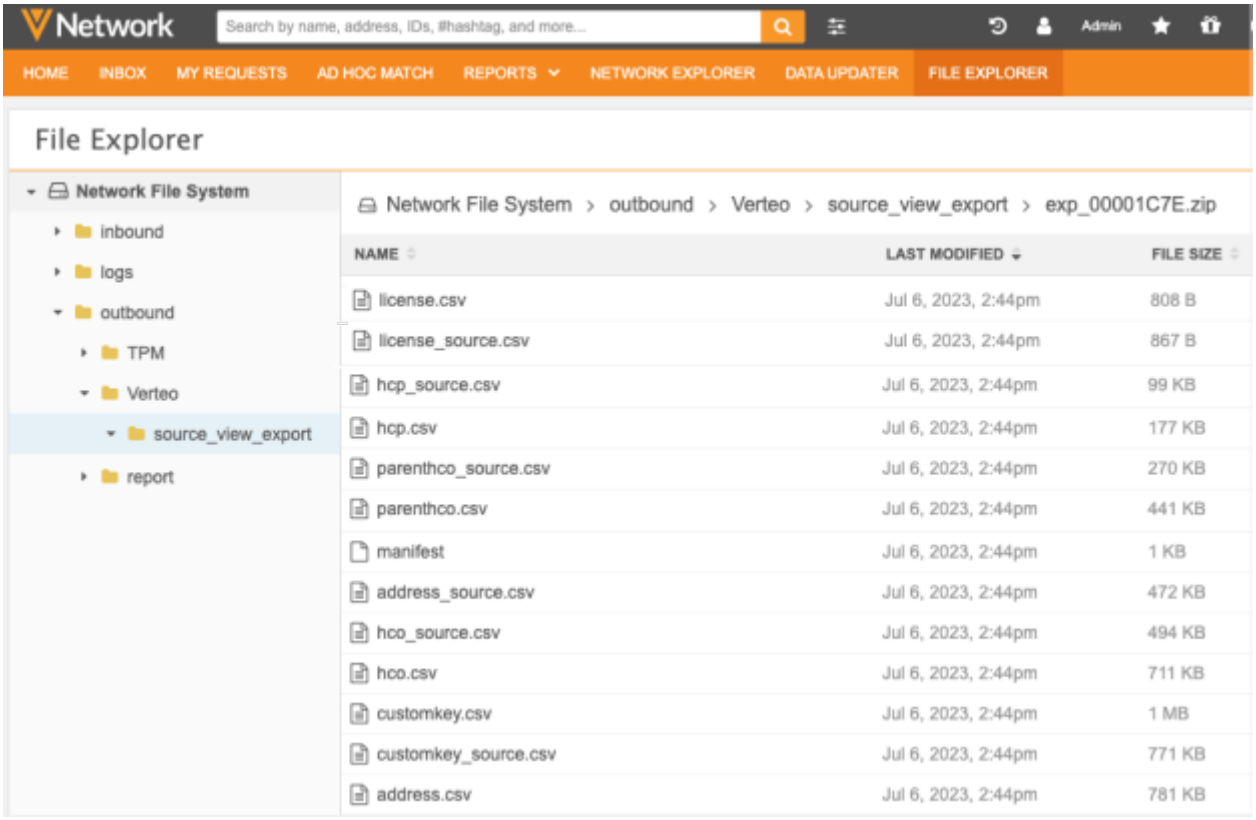
23R2

Use transformation queries to process source view files in outbound transformation queries. Previously, source view files could only be exported to downstream systems using target subscriptions. Now, you can post-process the files in Network using transformation queries. For example, you can save the exported source data as a custom table so you can report on data lineage

About source views

Data lineage source views contain field values that are loaded through source files or were added through data change requests. The values may or may not be applied to records depending on your source rankings.

When you export source views in a target subscription, source view files are exported for every object that is exported. Object source files are saved in the export file with a specific file name; for example, `hcp_source.csv`.



Previously, it was not possible to query source view files that are exported in target subscriptions. The exported source files names could not be validated in the transformation query.

Now, you can export the source views in a target subscription and post-process them using a transformation query. For example, the source view data can be saved as a custom table so that you can then run a query against the table to report on the data.

Example scenario

For this example, we will process the source view data and save the query output as a custom table so we can report on the data lineage information. Data lineage tables are not available through Network Reporting.

To do this, we'll follow this process:

1. **Transformation query** - Create a transformation query that will save the source file output as a custom table.

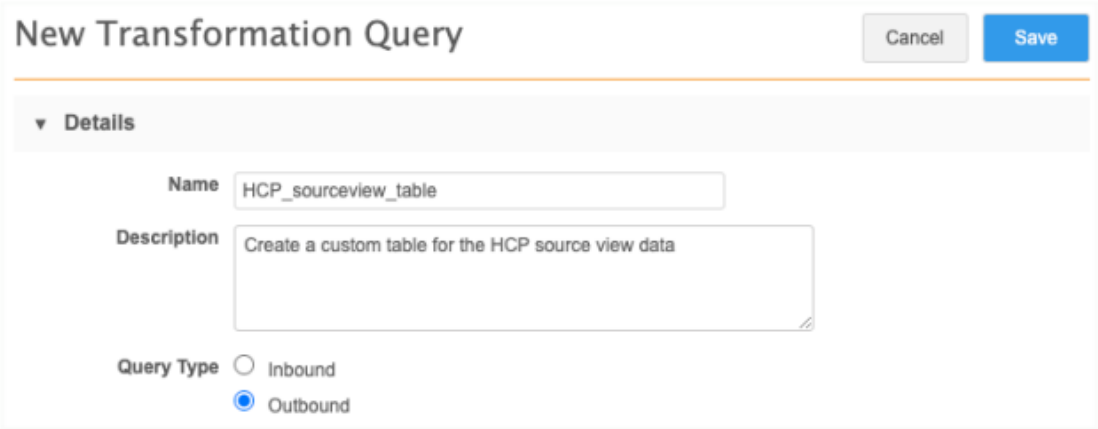
   We'll create an outbound transformation query that processes the `hcp_source.csv` source file output as a custom table.
2. **Target subscription** - Configure a subscription to export source data. Link the transformation query to the target subscription.
3. **Report** - Use the custom table to query the source view data.

Create the transformation query

Configure an outbound transformation query that persists the output in a custom table.

1. In the Admin console, click **System Interfaces > Transformation Queries**.
2. Click **Add Query**
3. Type a **Name** and **Description**.
4. Beside **Query Type**, choose **Outbound**.

   The **Outbound** query type will post-process data before it is exported using a target subscription



5. In the **Query Output** section, select **Custom Table**.

   Note: All output options can be selected if you also want the data in a .csv file or lookup table.

   - Type a **Table Name** and **Table Description**.

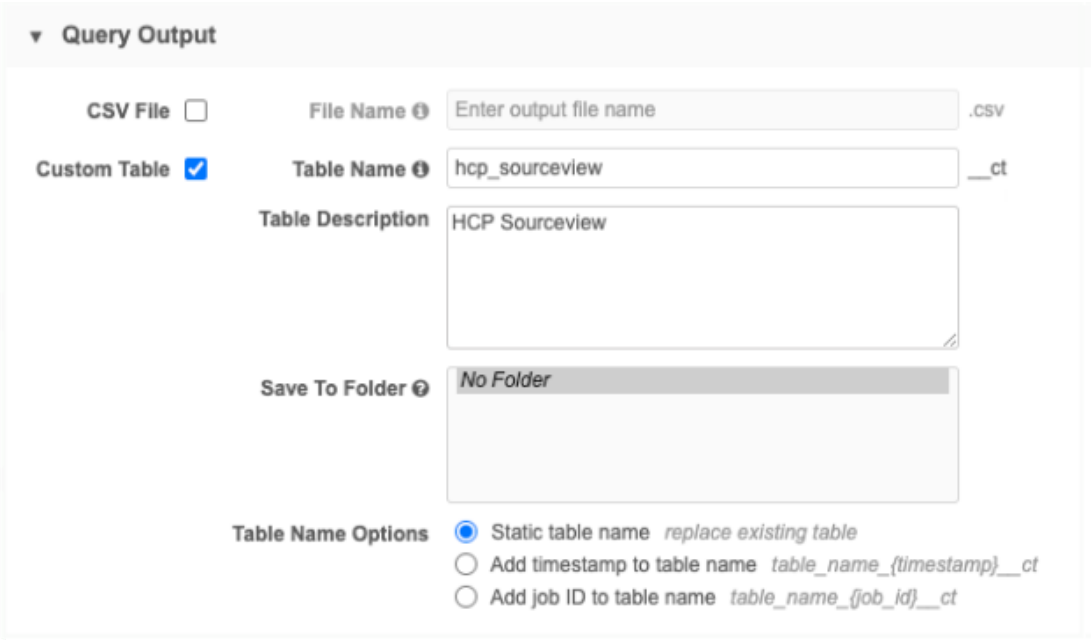
     The table name will automatically be appended with the `__ct` suffix.

- Choose the folder where the table will be saved. If you have folders created in the **Shared Folders** category in the SQL Query Editor, they will display in this list.

  Transformation queries cannot be saved to personal folders (**My Custom Tables**) because the data is exported through subscriptions, which are not applied to users.

- Choose one of the **Table Name Options**:
  - **Static table name** - The table name is always the same, so it means any existing custom table with the same name is replaced each time the query runs. For example: `hcp_sourceview__ct`.
  - **Add timestamp to table name** - Append a timestamp to the table name. For example: `hco_table_20221102t045341z__ct`.
  - **Add job ID to table name** - Append the subscription job ID to the table name. For example: `hco_table_15953__ct`

  For this example, we will choose **Static table name**. Each time the target subscription runs, the table will be replaced.



6. Create the SQL query that will read the source view file .

   Example query

```
select * from hcp_source__csv
```

Paste the query into the query box.

Create the target subscription

Configure your target subscription to export only the source view data. Link the transformation query to the subscription so the query output saves as a custom table.

1. In the Admin console, click **System Interfaces > Target Subscriptions**.
2. Open an existing subscription or click **Add Subscription** to create a new one.
3. **Details** section - Configure the following settings:
   - Type a **Name** and **Description** for the subscription.
   - **Type** - Choose **Data**. Transformation queries are not supported for subscriptions that export DCRs.
   - **System** - Choose the source system.
   - **Status** - The subscription is enabled by default.
4. **General Export Options** section - Select the to export data lineage information.

   By default, all sources that are configured in your environment are selected. Expand the list to clear any sources you do not want to include in the export file.

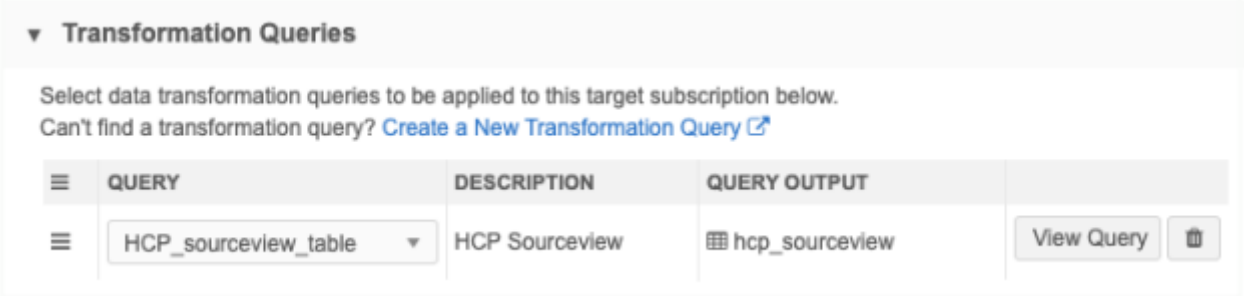
   Important: Select only the sources that you want to report on. Source view files can contain millions of rows (records multiplied by sources). Limit the number of sources to minimize the processing time and to prevent transformation queries from timing out. If there are several sources that you want to process, consider splitting up the source view exports into different target subscription jobs.

   For more information about this setting, see Including source data in the *Veeva Network Online Help*.

   Accept the other default settings in this section.

5. **Field & Field Selection** section - Choosing the **Include Source Data view in export files** setting enables all of the objects and sub-objects in this section for export.
6. **Object Export Options** section - Use this section to filter any records you do not want to export.
7. **Transformation Queries** section - Click **Add Query** to add the transformation query to the subscription.

The **Query Output** column lists the custom table that will be created when the job runs. If the file name is truncated, hover over the column to see a tooltip with the complete file names.



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

Report on source views

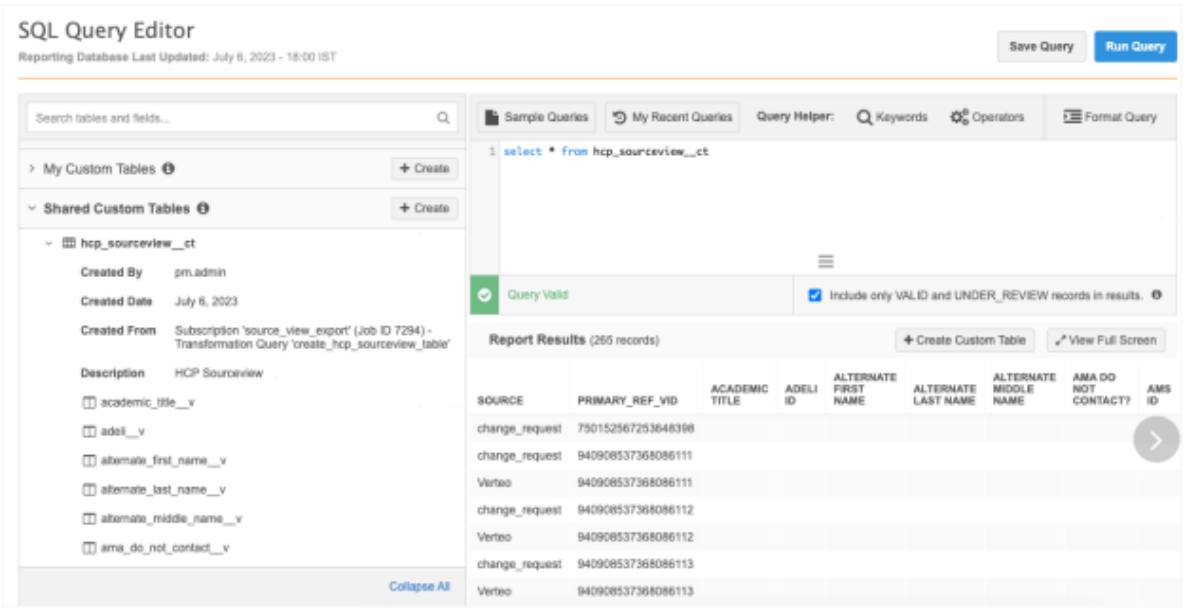
To report on the data in the exported source view, create a query using the custom table.

1. In the Network menu bar, click **Reports > SQL Query Editor**.
2. Expand the **Shared Custom Tables** category in the tree view.

   Review the metadata (for example, the target subscription name, job ID, transformation query name) and the fields.
3. Use the table or fields in a query to report on the data from those sources.

Example query

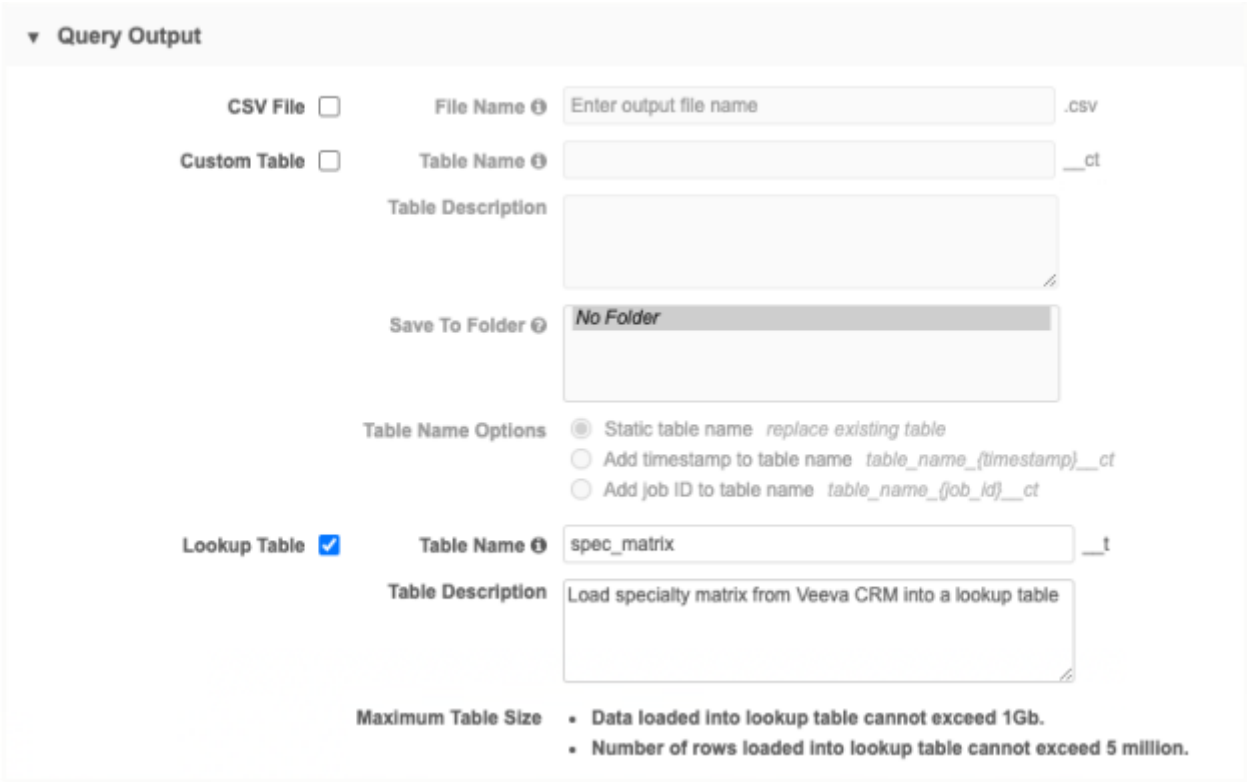
```
select * from hcp_sourceview__ct
```



SAVE QUERY OUTPUT INTO LOOKUP TABLES

23R2

Administrators and Data Managers can create and update lookup tables by using transformation queries in source and target subscriptions. Instead of manually creating a lookup table, you can run a subscription to save the query output into a lookup table. You can then use the lookup table to populate data model field values using the LOOKUP function.



This enhancement is available in the 23R2.0.1 Production release.

Lookup table support

- **Maximum size**: 1 GB or 5 million rows.

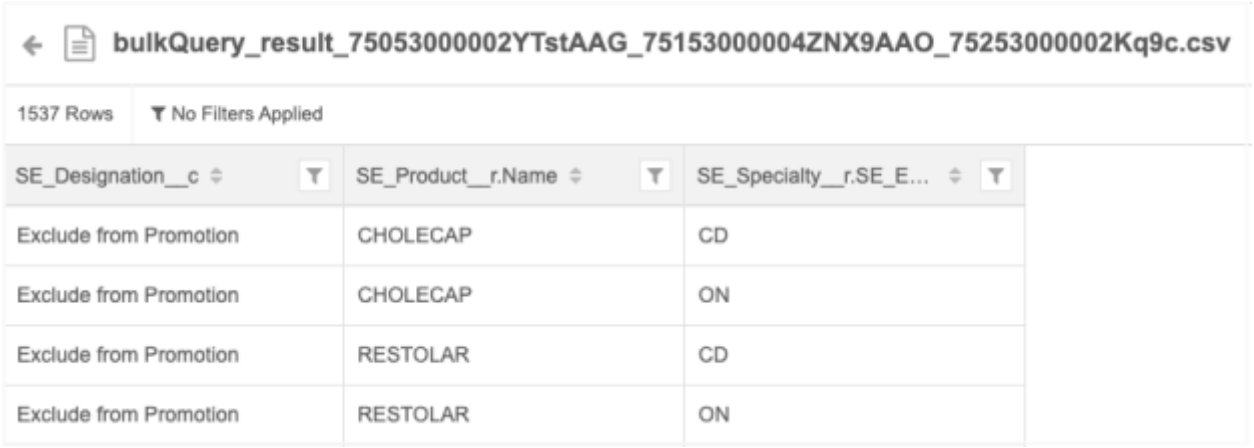
  If the transformation query creates a lookup table that exceeds the maximum size, the source subscription job will fail.

  Lookup tables have a maximum size limit because they are stored in memory to support the NEX lookup functions.

Example scenario

In this example, we'll use a source subscription to load a product specialty matrix file from Veeva CRM.

Example source file


bulkQuery_result_75053000002YTstAAG_75153000004ZNX9AAO_75253000002Kq9c.csv

1537 Rows | No Filters Applied

SE_Designation__c	SE_Product__r.Name	SE_Specialty__r.SE_E...
Exclude from Promotion	CHOLECAP	CD
Exclude from Promotion	CHOLECAP	ON
Exclude from Promotion	RESTOLAR	CD
Exclude from Promotion	RESTOLAR	ON

The transformation query will save the output as a lookup table. We can then use the lookup table to populate data model field values using the LOOKUP NEX function.

Process

1. **Transformation query** - Create a transformation query that will save the file output as a lookup table.
2. **Source subscription** - Configure the source subscription to load the file and create the lookup table.
3. **Use the lookup table** - Use the lookup table in a NEX rule to populate field values

Create a transformation query

To create the transformation query to use in a source subscription:

1. In the Admin console, click **System Interfaces > Transformation Queries**.
2. Click **Add Query**.
3. **Details** section - Type a **Name** and **Description** and choose the **Inbound** query type.
4. **Query Output** section - Select **Lookup Table**.
5. Type a **Table Name**. It is automatically appended with the `__t` suffix.

   Table name support:
   - Supported characters: lowercase letters (a-z), numbers (0-9) and underscore (_) characters.
   - Maximum length: 100 characters.
   - The name cannot begin with a number.

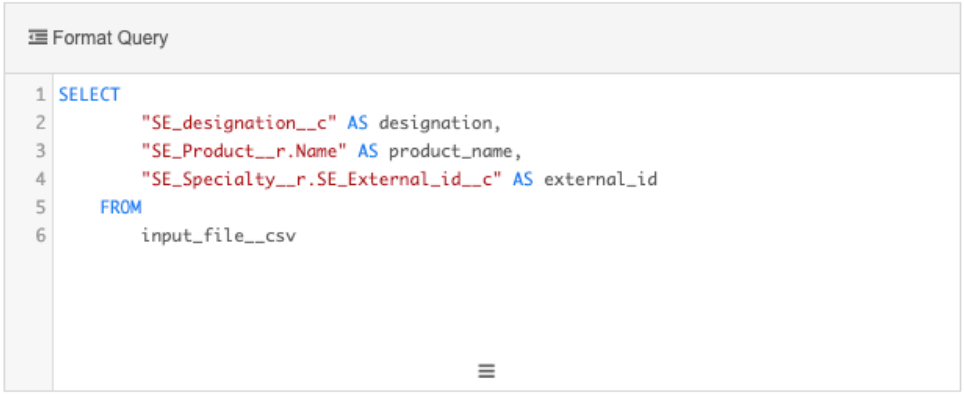
Note: Transformation queries replace lookup tables that have the same name. If you want to append or upsert data to an existing lookup table, you can define that logic in the transformation query.

6. In the **Transformation Query** section, define the query.

   Example query

```
SELECT
          "SE_designation__c" AS designation,
          "SE_Product__r.Name" AS product_name,
          "SE_Specialty__r.SE_External_id__c" AS external_id
     FROM
          input_file__csv
```

   Note that this query uses the file alias, `input_file__csv`, that you can define in the source subscription.



Tip: In this example, the column names from the specialty matrix file from Veeva CRM are renamed to a simplified name so it is easier to reference the column names in the LOOKUP function to populate the field values.

Upsert or append data to existing lookup tables

When query output is saved as a lookup table, the lookup table is replaced each time the subscription runs.

You can include logic in the transformation query to add and/or update data to the data in the existing lookup table.

- **Upsert** - Using a delta file (new records and updates), join the data from the existing lookup table and the source file. The source file can add new data and update existing data in the lookup table.
- **Append** - Using a delta file (only new records), union the data from the existing lookup table and the new data from the source file.

When the subscription runs, the lookup table will be replaced with the output of the query.

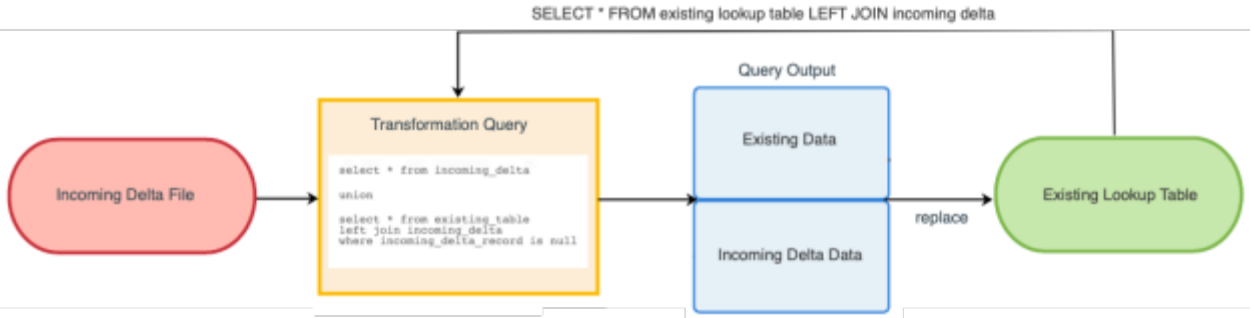
Upsert delta data to existing lookup table

You can add new data and update changed data in the existing lookup table by loading a delta file. To do this, create a transformation query that will union the incoming data from the delta file with the existing data in the lookup table.

Use a LEFT JOIN and a WHERE clause to remove any existing records in the lookup table that match on the same ID in the incoming delta file.

When data is upserted to an existing lookup table, the following behavior occurs:

- Existing data that is not in the delta file is replaced in the lookup table.
- Existing data that is in the delta file is replaced in the lookup table.
- New records in the delta file are created in the lookup table.



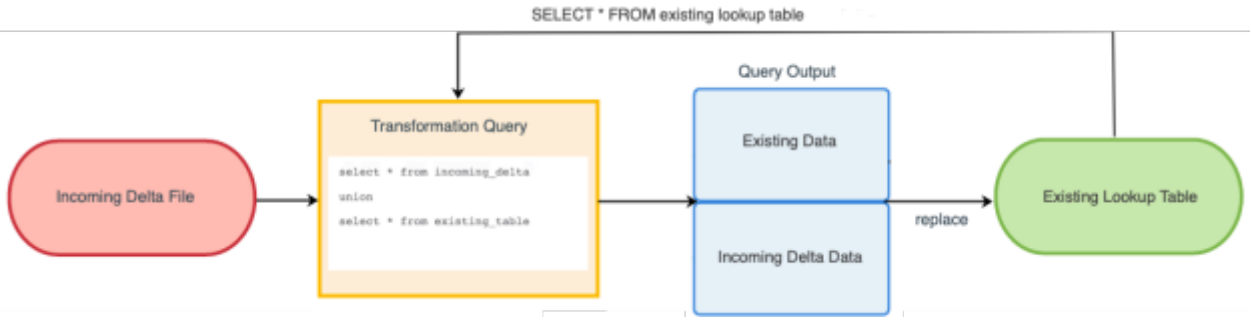
Append delta data to existing lookup table

To add new data to the existing lookup table, create a transformation query that will union the incoming data from the delta file with the existing data in the lookup table.

Important: Ensure that the delta file includes only new records and no changes to existing records; otherwise, the lookup table will have duplicated records.

When data is upserted to an existing lookup table, the following behavior occurs:

- All data in the existing lookup table is replaced in the lookup table.
- All data in the delta file is added in the lookup table.



For similar examples using custom tables, see Upserting or appending delta data to a custom table in the *Veeva Network Online Help*.

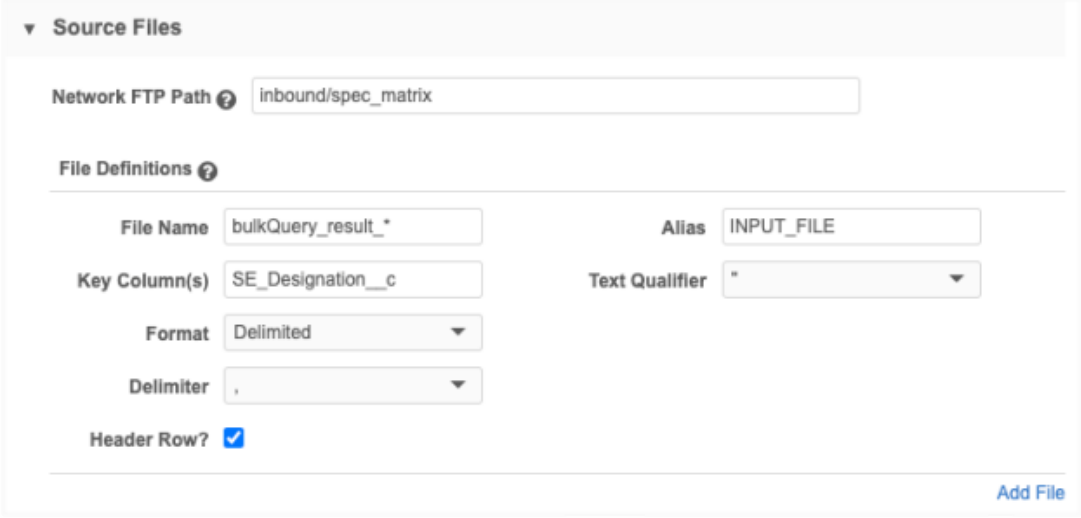
Create a source subscription

Configure the source subscription to load the file. Link the transformation query to the subscription so the query output is saved as a lookup table.

To create the source subscription:

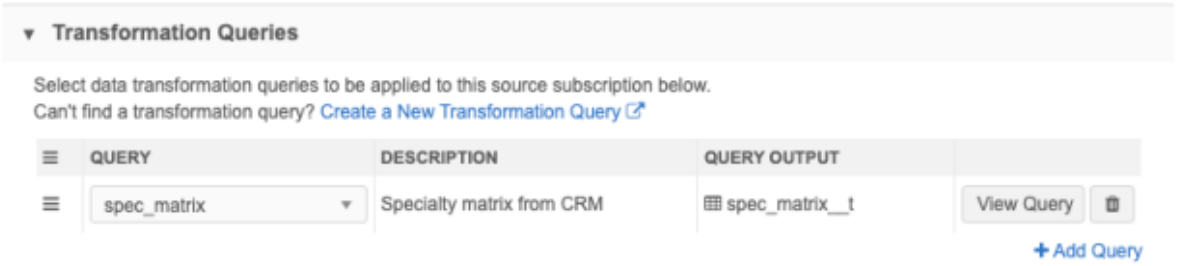
1. In the Admin console, click **System Interfaces > Source Subscriptions**.
2. Click **Add Subscription > Use Classic Mode**.
3. **Details** section - Configure the following settings:
   - Type a **Name** and **Description** for the subscription.
   - **System** - Choose the source system.
   - **Status** - The subscription is enabled by default.
4. **Settings** section - Accept the other default settings in this section.
5. **Source Files** section - Define the following settings:
   - **Network FTP Path** - Define the location of the file.
   - **File Definitions** - Define the information for the file that you will load.

   Example

   No configuration is required for the **Modelling & Normalization**, **Network Expression Rules**, and **Match Configuration** sections in this scenario.

6. In the **Transformation Queries** section, add the query that will read the file and transform the output to a lookup table.



If the transformation query has more than one output type (for example, a lookup table and a custom table), each output type displays in the **Query Output** column.

7. **Save** your changes and click **Start Job** to run the subscription to save the data to a lookup table.

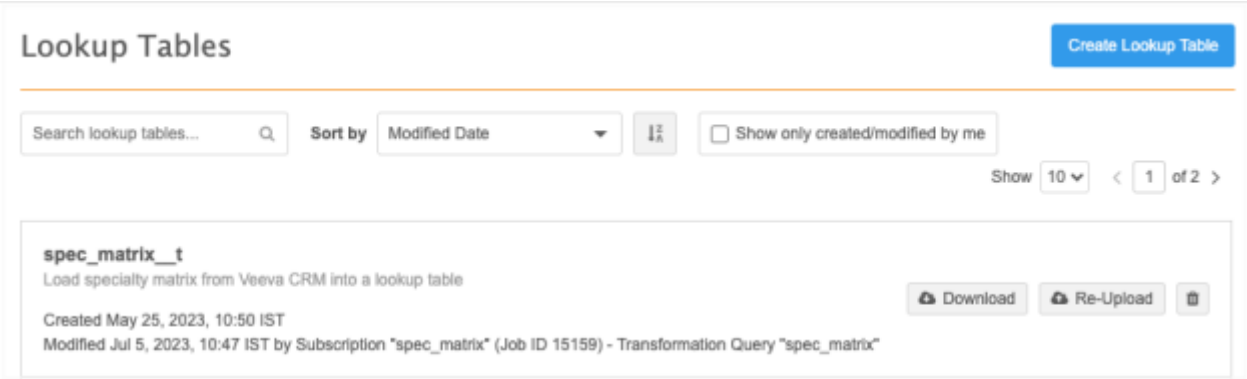
Lookup table

On the Lookup Tables page (**Data Model > Lookup Tables**), the new table displays in the list.

The following details display for the lookup table:

- name and description
- created date
- modified date (if the table has been re-uploaded by a subscription)

  Each time the subscription runs, the lookup table is replaced. This is the same as re-uploading a lookup table.
- source subscription name and job ID that created the table
- transformation query name that was used in the subscription



Now, you can report on the lookup table, or you can use it in a NEX rule; for example, to populate data model field values.

For more information and examples, see Lookup tables in the *Veeva Network Online Help*.

Exporting configurations

If you export the transformation query to a target environment, all output options (including lookup table options) are exported.

Source subscriptions

ARCHIVING SOURCE FILES

Files used in source subscriptions can now be automatically archived on Network's FTP server.

Downstream systems often generate files with the same or similar file names to load full or delta updates. Previously, if you wanted the ability to return to files used for a specific job, you had to rename or remove the files after a subscription ran so they were not overwritten. Now, the files can be archived to a folder so you can review, download, or use them to re-run a subscription job.

This feature is available by default. Administrators can enable the setting in each source subscription configuration.

About the archive

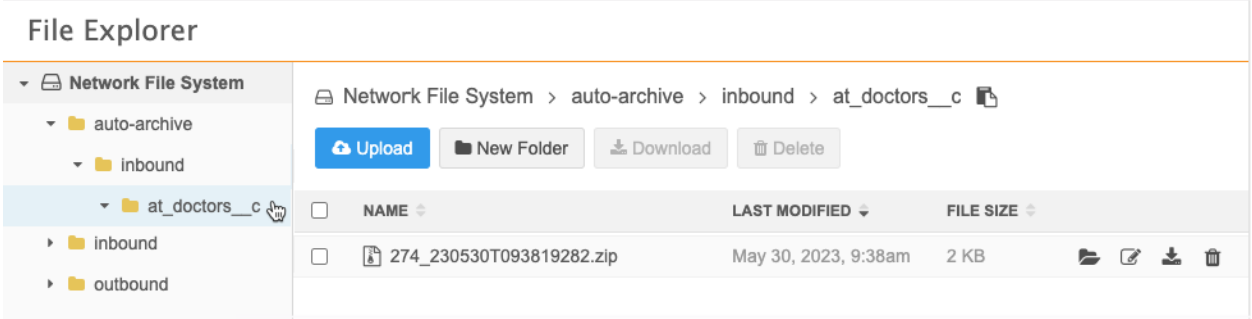
When the **Allow Auto-Archive** setting is enabled in a source subscription, the source files are automatically moved from the **inbound** folder to the **auto-archive** folder on your Network FTP server if the job completes. Files are archived even if the job completes with warnings.

Note: Source files are not archived if the job fails.

The folder is predefined and cannot be edited.

Network FTP path: `auto-archive/inbound/subscriptionCode/jobID_timestamp.zip`

Note: The timestamp used for the .zip file is `YY-MM-DDThh:mm:ss.fff`, for example, 230530T093819282.



The archive contains a compressed (.zip) file containing all of the files in the feed.

The auto-archive folder is read-only; it cannot be modified.

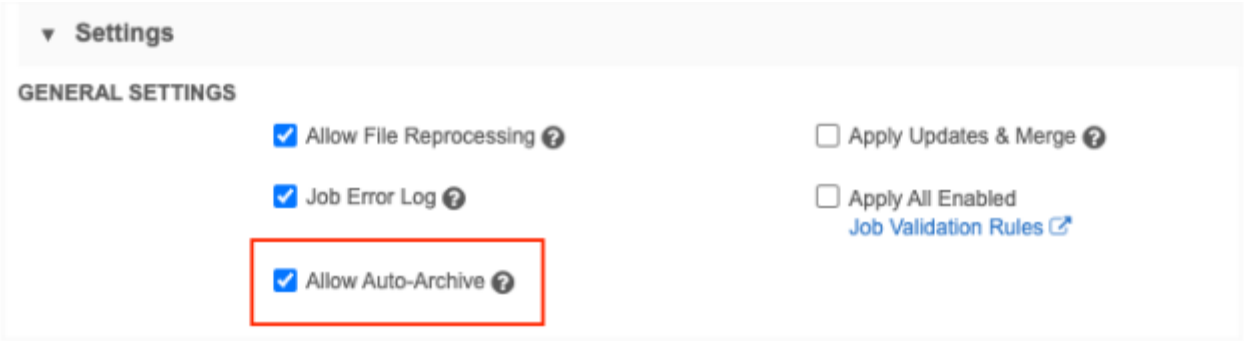
File retention

The files are retained for one year so you can review and re-run the feed as needed. The expiration time complies with Amazon S3's expiration policy.

Enable the archive setting

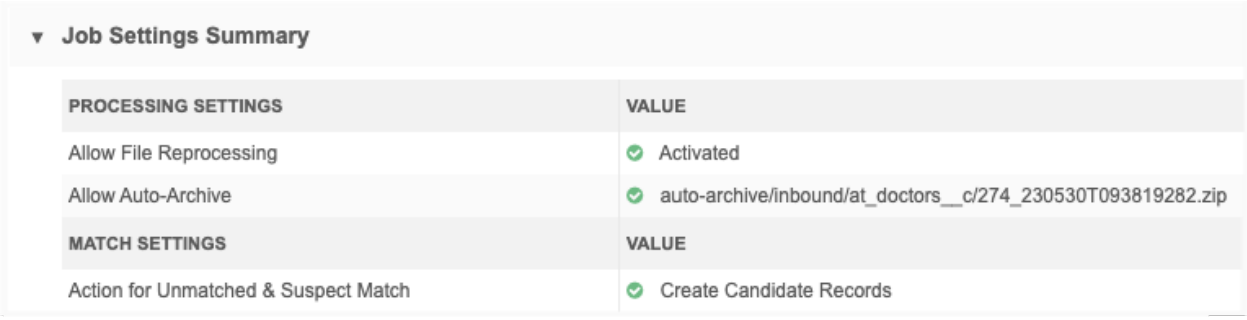
Administrators and Data Managers can enable the archive option for source subscriptions. By default, the setting is not enabled.

In the source subscription configuration, select the **Allow Auto-Archive** setting in the **General Settings** section.



Job Details

In the Job Details page, The **Job Settings Summary** contains the **Allow Auto-Archive** heading so you can see the path and file name of the archived file for completed jobs.



- If a job fails, no files are archived and the message "No file path available" displays for the setting.
- If **Allow Auto-Archive** was not enabled, the setting displays as **Deactivated**.

Advanced properties

When the **Allow Auto-Archive** setting is enabled, the following property is added to the subscription:

- `"Feed.stash":"true"`

To view advanced properties, click **Advanced Mode** in the subscription configuration.

Logs

Administrators can track archived files in the System Audit History.

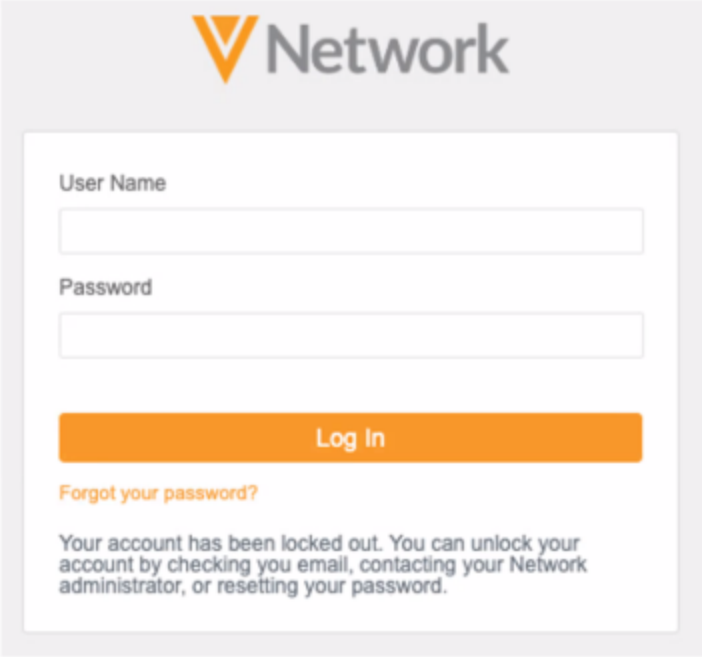
Users

UNLOCKING YOUR NETWORK ACCOUNT

23R1.1.2

For security, users are locked out of Network after five consecutive unsuccessful login attempts. To regain access to Network, you can now unlock your own account, or you can ask your Network Administrator to unlock your account or reset your password. Previously, resetting your own password was the only option.

These new options are supported for active users that do not use single sign-on.

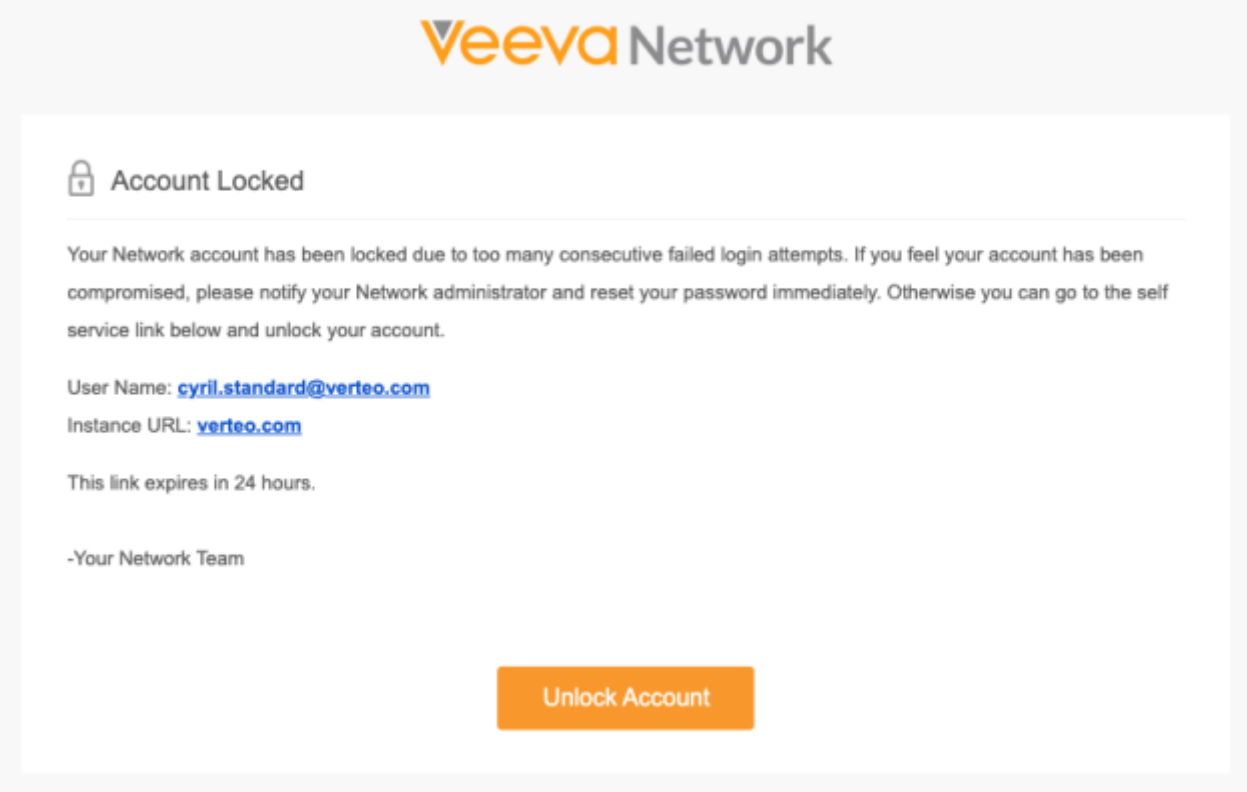


This enhancement is enabled by default in your Network instance. It will be available in the 23R1.1 Production release.

Unlock your account

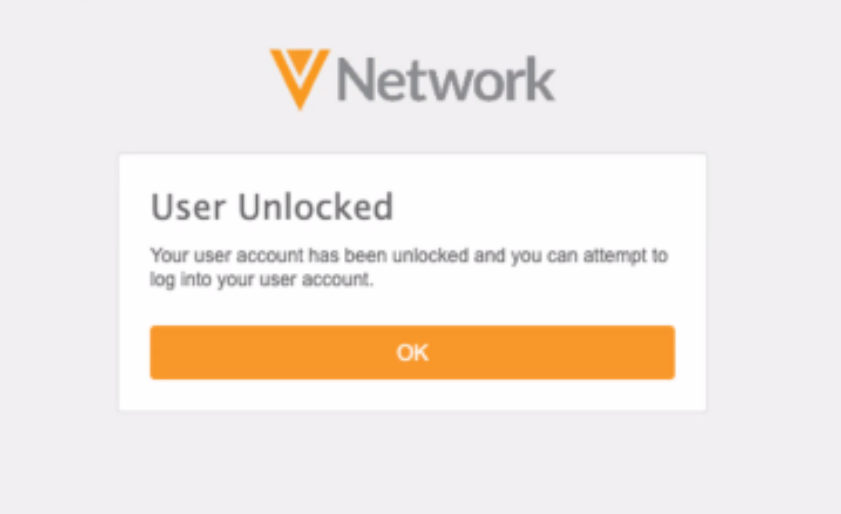
Previously, to regain access to Network again, you had to reset your password. Now, you can unlock your account and continue to use your current password.

After you are locked out of your account, you will receive an email containing your username and your Network instance.



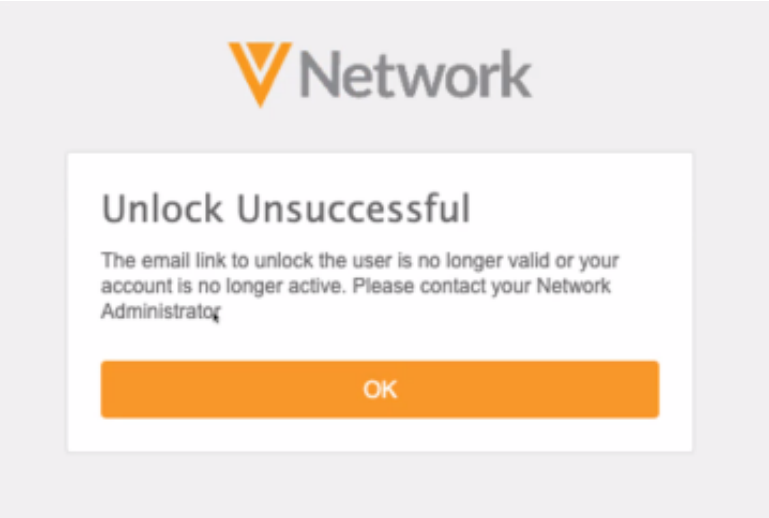
- Click **Unlock Account**.

After the account is unlocked, the email is no longer valid. If multiple emails are sent, only the most recent email link is valid. The link to unlock the account expires after 24 hours.



- In the confirmation message, click **OK** to be redirected to the Network Log In page. Use your current password to access Network.

If the link has expired or your account is inactive, a message displays. Contact your Network Administrator and ask them to unlock your account.



PASSWORD MANAGEMENT

23R1.1

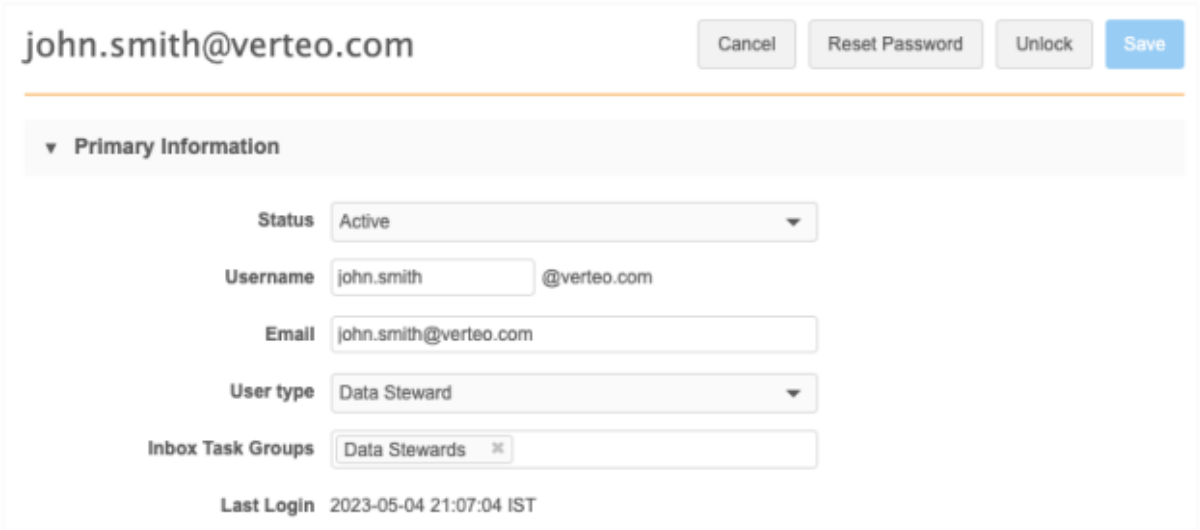
For security, users are locked out of Network after five consecutive login attempts. To regain access to Network, Network Administrators can now unlock your account or reset your password. Previously, resetting your own password was the only option.

These new options are supported for active users that do not use single sign-on.

This enhancement is enabled by default in your Network instance.

Managing accounts from the user page

When you become locked out of your account, Administrators can now unlock your account so you can continue using your current password, or they can reset your password if you have forgotten it.

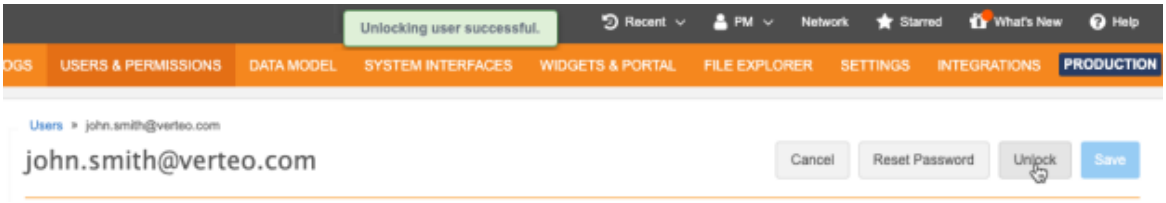


To manage a user's password:

1. In the Admin console, click **Users & Permissions > Users**.
2. Select the user to open their account page.
3. Click **Unlock** or **Reset Password** on the user page.
    - **Unlock** - Allow the user to regain access Network using their current password.

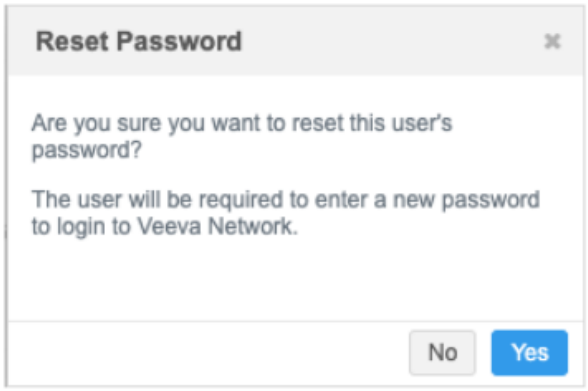
      Note: The **Unlock** button displays only if an active user is locked out.

      A message displays to indicate that the user has been unlocked.

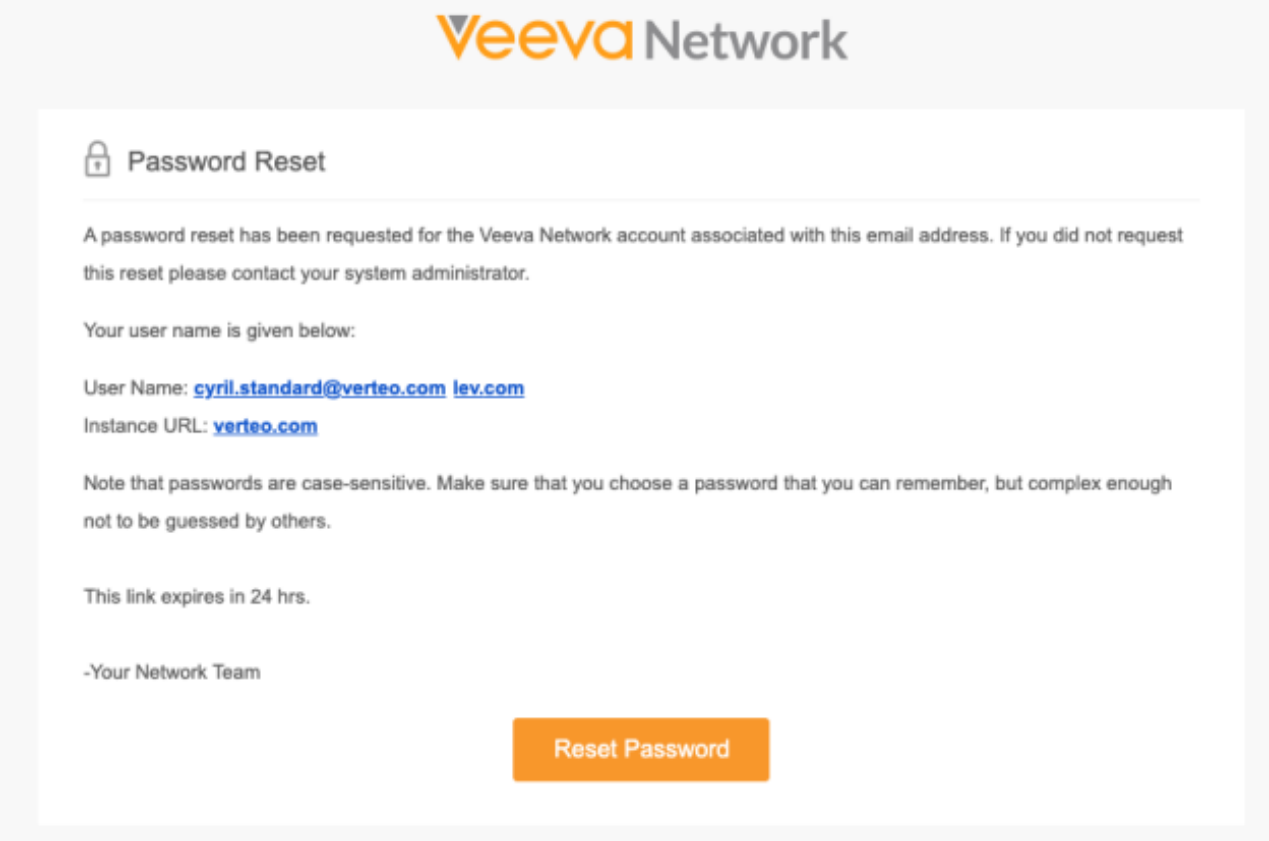
    - **Reset Password** - The user will receive an email to reset (change) their password so they can regain access to Network. This button displays on all user account pages by default.

      After you click the button, confirm that you want to reset the password for this user.

      A message displays to indicate that the password reset is complete.

      Users will receive an email to notify them that their password has been reset. The email is sent from `network-emails@veevanetwork.com`.



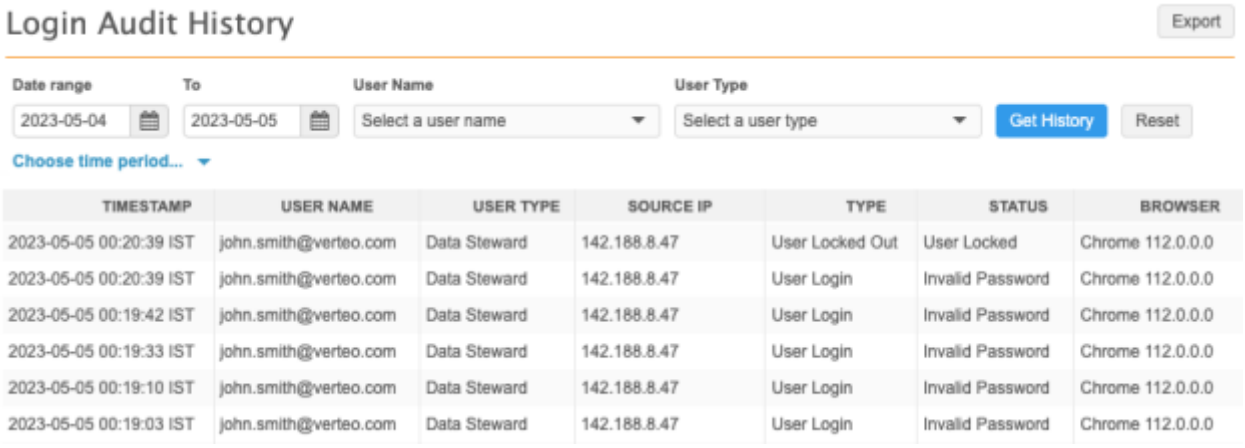
Users can click **Reset Password** to change their password and regain access to Network.

The link to reset the password can be used once and expires after 24 hours.

Tracking password management

Login Audit History

Administrators can view the Login Audit History to see when user has been locked out.

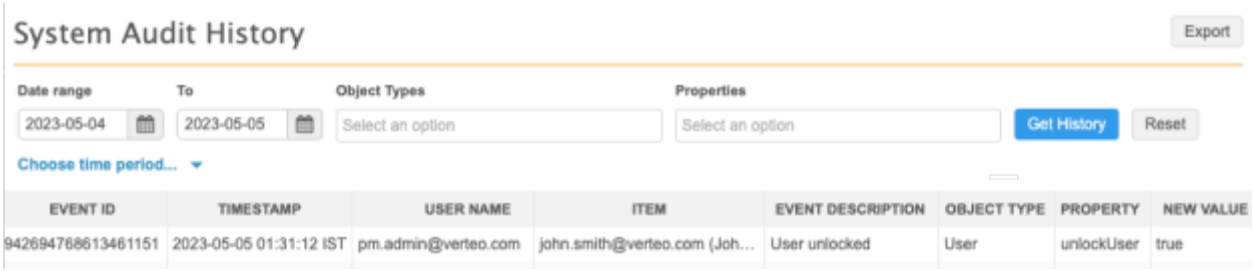


TIMESTAMP	USER NAME	USER TYPE	SOURCE IP	TYPE	STATUS	BROWSER
2023-05-05 00:20:39 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Locked Out	User Locked	Chrome 112.0.0.0
2023-05-05 00:20:39 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:42 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:33 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:10 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:03 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Login	Invalid Password	Chrome 112.0.0.0

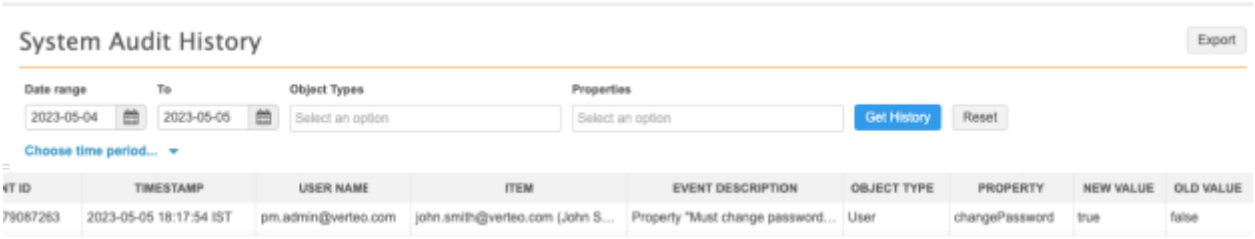
System Audit History

The System Audit History tracks the user who unlocked the user or reset the password.

Unlock



Password reset



Network integrations

HASHTAGS IN VEEVA CRM

23R1.1

Network hashtags are stored in the **Account Identifier** field in CRM, by default. If you already have data in that field, you can choose to store hashtags in an alternate custom field.

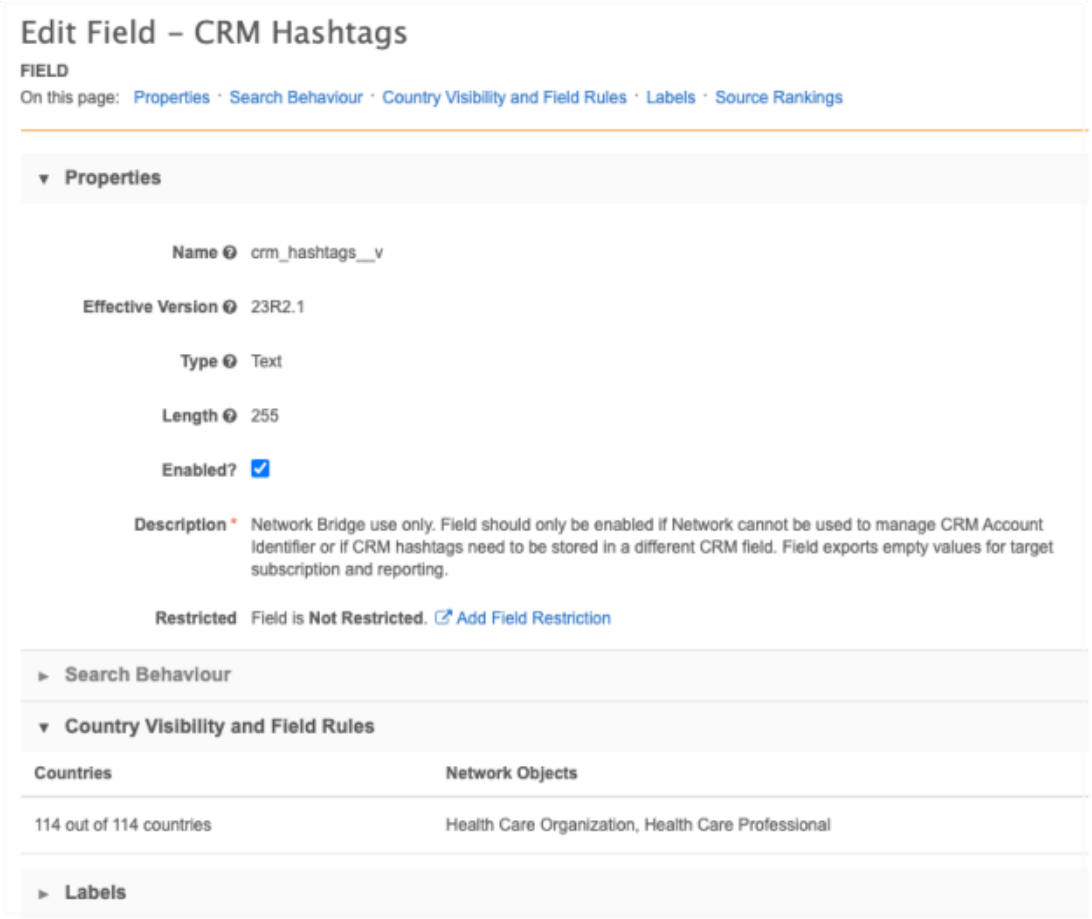
To support an alternate field for hashtags in CRM, Network has a new field called **CRM Hashtags** (`crm_hashtags__v`). You can map this Network field to your custom field in CRM. When the Network Bridge runs, hashtags are calculated in the Network field and are pushed to CRM to display in the custom field.

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

About the field

When the feature is enabled in your Network instance, the **CRM Hashtags** field will be enabled for HCP and HCO objects (**Data Model**). The field is read-only; it cannot be edited by submitting a data change request.

The field value is empty in target subscriptions and throughout the Network application (for example, Network Reporting) because hashtags are dynamically calculated.



Veeva CRM configuration

To use the `crm_hashtags__v` field, configure CRM to accept the field from the Network Bridge.

The following configuration is required in Veeva CRM:

- **Field mapping** - Map the `crm_hashtags __v` field between CRM and Network.

CRM Field API Name	Network Field API Name
Network_Hashtags__c	crm_hashtags__v

For details, see Network field mapping in the *Veeva CRM Online Help*.

- **Network Managed Account Identifier** Network Setting - The setting value must be set to `1` or `2`.

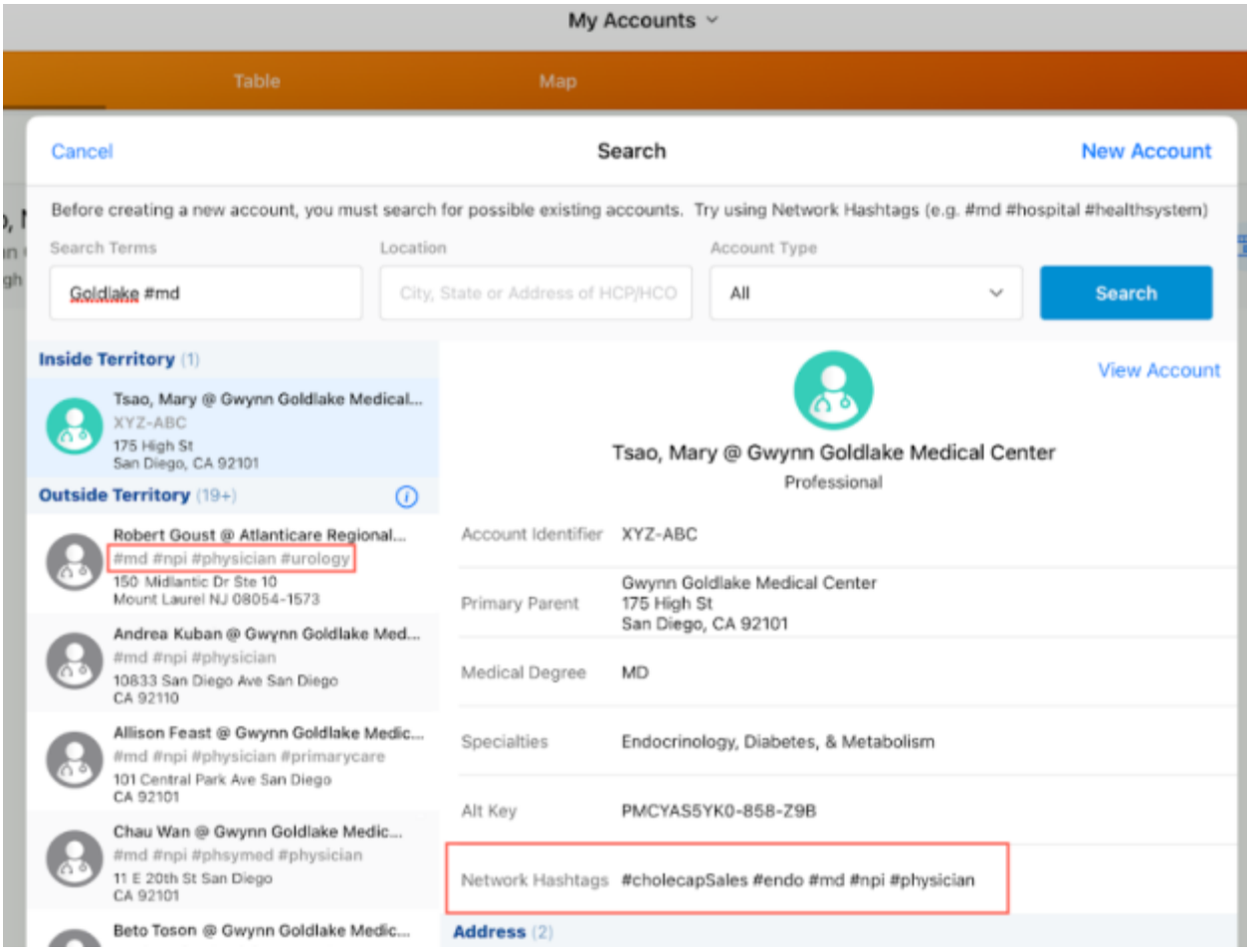
  Setting value *1*

  If the **Network Managed Account Identifier** Network Setting is set to `1`, only the alternate field, `Network_hashtags__c` is populated with hashtags in CRM.

Veeva ID field	Network_hashtags__c
942356340136150623	#md #npi #physician #salesdata #targetAllergy #targetOncology #targetNeurology #targetUrology
942356333379585631	#nurse

  Example - Hashtags in Network Account Search

  Hashtags display in the custom field on the account. In the **Outside Territory** search results, the hashtags display in the **Account Identifier** only for the UI.



Setting value *2*

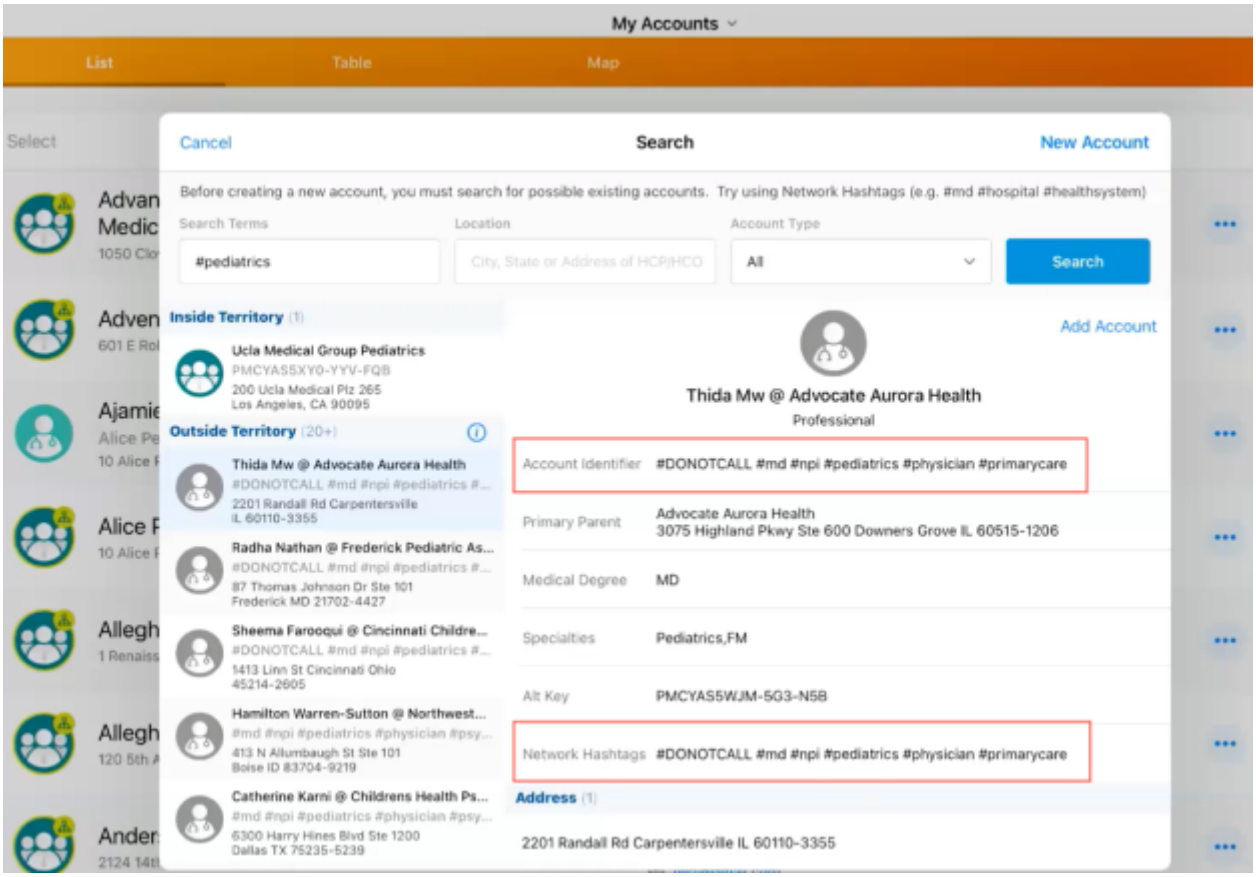
If the **Network Managed Account Identifier** Network Setting is set to `2`, the Account_Identifier_vod__c field and the alternate field, `Network_hashtags__c` is populated with hashtags in CRM.

Note: There is no maximum length for `Network_hashtags__c` field so additional hashtags might display.

Veeva ID field	Account_Identifier_vod__c (max length: 80)	Network_hashtags__c
942356340136150623	#md #npi #physician #salesdata #targetAllergy #targetOncology #targetNeurology	#md #npi #physician #salesdata #targetAllergy #targetOncology #targetNeurology #targetUrology
942356333379585631	#nurse	#nurse

Example - Hashtags in Network Account Search

Hashtags display in the **Account Identifier** field and the custom field for **Outside Territory** results.



For details about this setting, see Network hashtags in CRM in the *Veeva CRM Online Help*.

Network Bridge

When the Network Bridge runs, it validates that the `crm_hashtags__v` field is enabled in Network and that the CRM configuration is complete to determine if the hashtag values should be updated in CRM.

The field is supported for:

- CRM Windows
- CRM Online
- CRM for iPad

Admin settings

AMAZON S3 IAM ROLE NAMES

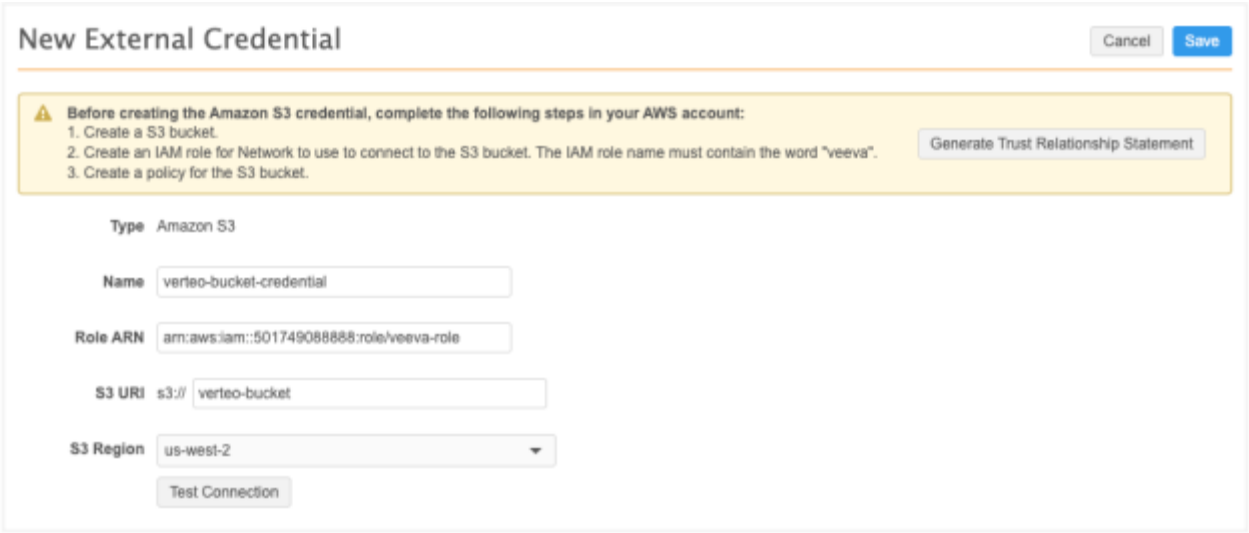
23R2

A Veeva naming convention for IAM role names is required for new S3 credentials. All new role names must contain "veeva". This requirement ensures that Amazon S3 security best practices are followed. Existing role names will continue to be supported.

This requirement is enabled by default.

Creating Amazon S3 credentials

The required IAM role naming convention displays when Administrators create a new S3 credential.



On the new credential, the **Role ARN** must contain the word "veeva". For example: `arn:aws:iam::501749088888:role/veeva-role`.

When the credential is saved, Network validates that the "veeva" name requirement is met.

API

VERSION UPDATE

23R2

The Network API is updated to v30.0.

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

As with all version updates, Integration Users should continue to use v29.0 until there is a change for v30.0 that they want to apply.

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

CUSTOM FIELDS IN OPENDATA SEARCH RESULTS

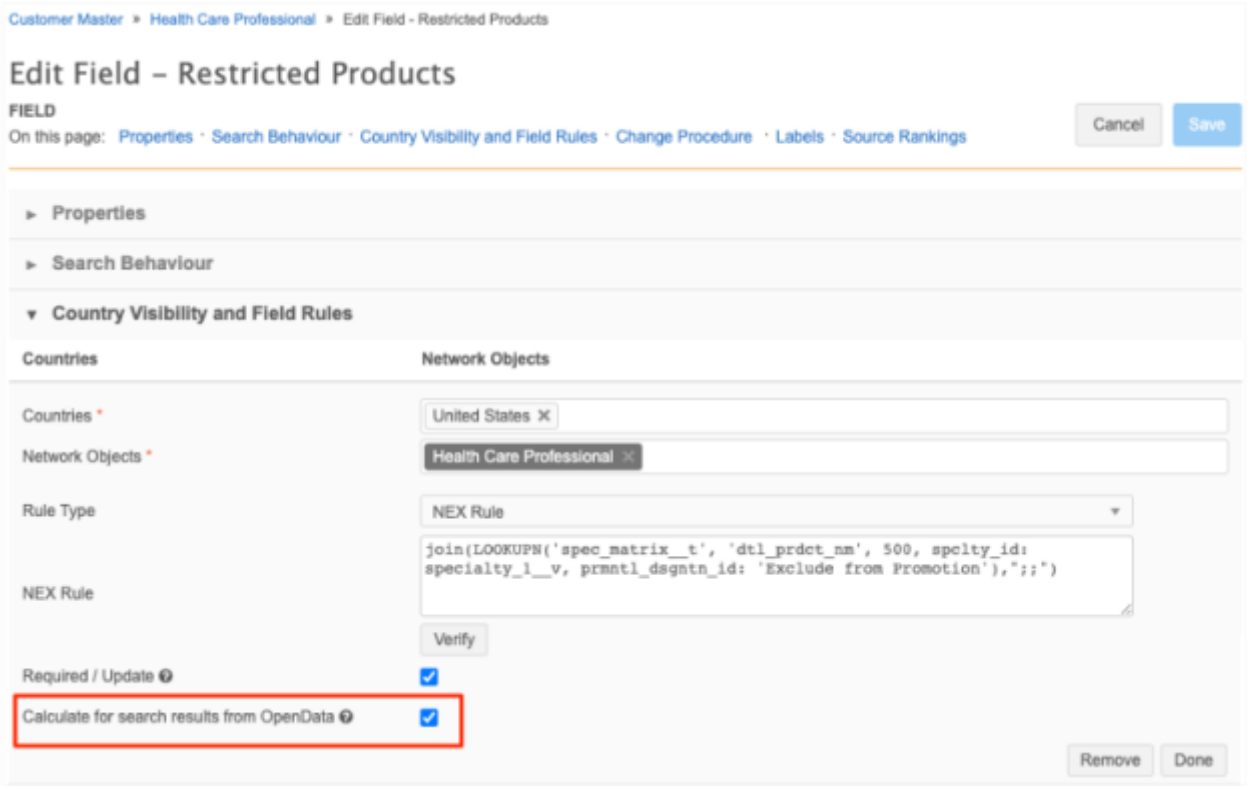
23R1.1

Custom fields that contain default or calculated values can now display in the Search API for OpenData search results.

Custom fields can be created to store calculated (formula) fields in Network. For example, you can use a lookup table in a NEX rule to populate restricted products into a custom field. These fields can use OpenData values as part of the formula, however, custom fields do not display in search results for records still in the OpenData instance.

Administrators can use a new setting on custom fields to display the default or calculated field values on search results to help end users select the relevant entity to download in Veeva CRM.

This enhancement is available by default in your Network instance. Administrators and Data Managers can enable the setting on custom fields.



Note: This setting displays default or calculated fields on search results for Veeva OpenData records in the Search API and in Veeva CRM.
It does not display the field values when you are previewing OpenData records to download in the Network UI or in Network Widgets.

Enable the field setting

The **Calculate for search results from OpenData** setting is available on custom fields for all Veeva standard objects.

To enable the setting:

1. Open a custom field (**Data Model**) on a Veeva object.

   Note: This setting is not supported for the following custom field types: Primary (Network Calculated or Unique Checkbox) and Alternate Key.

2. In the **Country Visibility and Field Rules** section, select the **Calculate for search results from OpenData** setting.

   The setting is available for NEX Rule and Default Value rule types.

   Support for NEX rule expressions include Lookup functions.

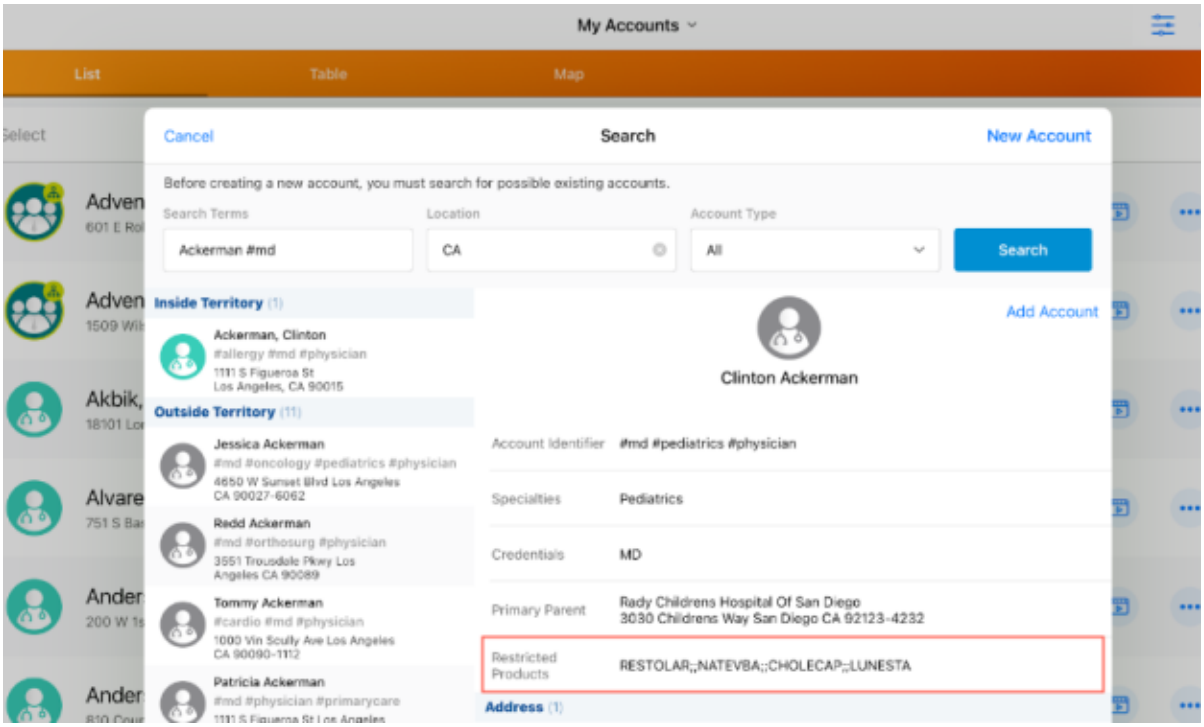
3. Save your changes.

When you search for a record, the field with the default or calculated (NEX rule) value displays on OpenData records that have not yet been downloaded to your Network instance.

Important: The default or calculated value cannot be used to filter for records in Veeva OpenData. The values are calculated for search results only.

Example

When a sales rep searches for an HCP in Veeva CRM, the **Restricted Products** custom field displays with the calculated value so the rep can decide if they should download the record from OpenData.



Search API

When Integration Users search for records, custom fields with the **Calculate for search results from OpenData** setting enabled will display the default or NEX rule calculated value in the Search API response.

Example response

The **Calculate for search results from OpenData** setting is indicated by the **resultIsFromMaster** value.


```
{
    "responseStatus": "SUCCESS",
    "entities": [
        {
            "entityId": "942733982759126623",
            "entityType": "HCP",
            "metaData": {
                "highlights": {...},
                "vid__v": "942733982759126623",
                "canDownloadFromMaster": true,
                "highlightTerms": [...],
                "resultIsFromMaster": true,
                "fromMasterInstance": 301,
                "relevance": 122.82719
            },
            "entity": {
                "gender__v": "M",
                "specialty_1__v": "PD",

                "hcp_type__v": "P",
                "first_name__v": "Clinton",
                "master_vid__v": "942733982759126623",
                "record_owner_type__v": "VOD",
                "record_delta_id__v": "942733982817222655",
                "last_name__v": "Ackerman",
                "record_owner_name__v": "OpenData",
                "medical_degree_1__v": "MD",
                "kaiser__v": "N",
                "formatted_name__v": "Clinton Ackerman",
                "primary_country__v": "US",
                "restricted_products__c": "RESTOLAR;;NATEVBA;;CHOLECAP;;LUNESTA",
                "hcp_status__v": "A",
                "vid__v": "942733982759126623",
                "is_externally_mastered__v": false,
                "specialty_1_rank__v": 1,
                "created_date__v": "2023-05-11T15:43:53.000-07:00",
                "pdrp_optout__v": "N",
                "is_veeva_master__v": true,
```

MATCH API

23R1.1

Reference value labels and reference aliases are now supported in Match API results.

API version

The parameters are supported for Network API version 29. If the parameters are used in earlier API versions, they are ignored.

Parameters

New optional parameters:

- `enrichedResults` - Specifies whether or not to display labels for reference type fields in the results.
- `resultLanguage` - Specifies the language to use if the enriched results option is enabled. Uses the IETF BCP 47 language standard.
- `systemName` - When provided, Network returns target alias values defined for reference codes for this system. Otherwise, Network returns default reference code values.

Display reference value labels

Use the following parameters to display the reference value labels in the Match API:

- `enrichedResults`
- `resultLanguage`

Example request

Return reference value labels in English (en).

```
POST
https://{{DNS}}/api/{{version}}/match/?enrichedResults=true&resultLanguage=
en
```

Note: Language labels are indicated by `value__u` fields.

Example response

```
{
     "responseStatus": "SUCCESS",
     "results": {
         "matchSetup": {...},
         "sourceEntity": {...},
         "matchedEntities": [
             {
                 "metaData": {...},
                 "matchResult": {...},
                 "entityType": "HCP",
                 "entityId": "940676573928359999",
                 "entity": {
```

```
                        "addresses__v": [
                            {
                                "address_line_1__v": "7777 Southwest Fwy Ste
540",
                                "locality__v": "Houston",
                                "premise__v": "7777",
                                "thoroughfare__v": "Southwest Fwy",
                                "administrative_area__v": "US-TX",
                                "administrative_area__v_value__u": "Texas",
                            }
                        ],
                        "email_1__v": "cooper.lopez@gmail.com",
                        "vid__v": "940676573928359999",
                        "first_name__v": "Cooper",
                        "last_name__v": "Lopez",
                        "specialty_1__v": "GS",
                        "specialty_1__v_value__u": "General Surgery",
                        "primary_specialty_group__v": "G-SURG",
                        "primary_specialty_group__v_value__u": "Surgery",
                        "medical_degree_1__v": "MD",
                        "medical_degree_1__v_value__u": "Doctor of Medicine",
                        ...
                    }
                },
                ...
            ]
        }
    }
```


Display reference alias names of reference values

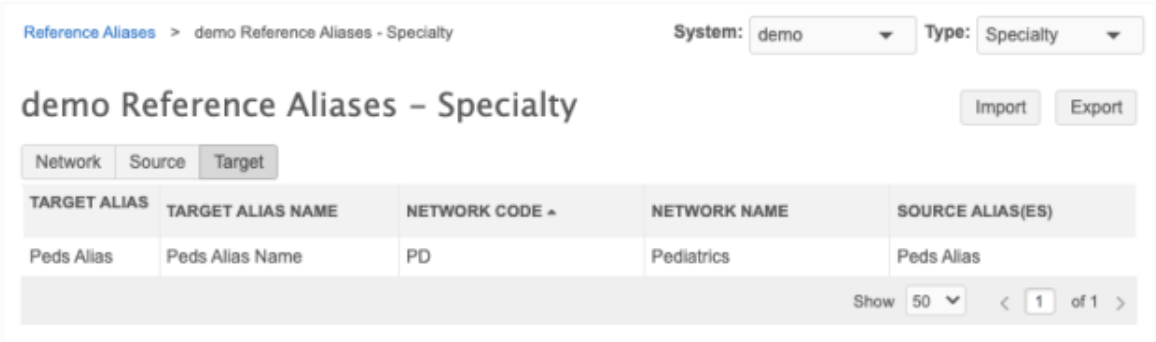
Use the following parameters to display the reference value labels in the Match API:

- `systemName`
- `enrichedResults`

Reference aliases

Reference aliases can be defined in **System Interfaces > Reference Aliases** for any source system defined in your Network instance.

Example reference alias



Example request

Return the target alias names from the system called *demo*.

```
POST
https://{{DNS}}/api/{{version}}/match/?enrichedResults=true&systemName=demo
```

Note: Target system alias names are indicated by `value__u` fields.

Example response

```
{
     "responseStatus": "SUCCESS",
     "results": {
         "matchSetup": {...},
         "sourceEntity": {...},
         "matchedEntities": [
             {
                 "metaData": {...},
                 "matchResult": {...},
                 "entityType": "HCP",
                 "entityId": "940676573928359519",
                 "entity": {
                     "addresses__v": [
                         {
                             "address_line_1__v": "7777 Southwest Fwy Ste
540",
                             "locality__v": "Houston",
                             "premise__v": "7777",
                             "thoroughfare__v": "Southwest Fwy",
                             "administrative_area__v": "US-TX",
                             "administrative_area__v_value__u": "Texas",
                         }
                     ],
                     "email_1__v": "astrid.gonzales@gmail.com",
                     "vid__v": "940676573928359519",
                     "first_name__v": "Astrid",
                     "last_name__v": "Gonzales",
                     "specialty_1__v": "Peds Alias",
                     "specialty_1__v_value__u": "Peds Alias Name",
                     "primary_specialty_group__v": "G-PD",
                     "primary_specialty_group__v_value__u": "Pediatrics",
                     "medical_degree_1__v": "MD",
                     "medical_degree_1__v_value__u": "Doctor of Medicine",
                     ...
                 }
             },
             ...
         ]
     }
 }
```

Display reference aliases

Use the following parameter to display the reference aliases for reference values in the Match API:

- `systemName`

Example request

Display reference aliases for the source system called *demo*.

```
POST https://{{DNS}}/api/{{version}}/match/?systemName=demo
```

Example response


```
{
     "responseStatus": "SUCCESS",
     "results": {
         "matchSetup": {...},
         "sourceEntity": {...},
         "matchedEntities": [
             {
                 "metaData": {...},
                 "matchResult": {...},
                 "entityType": "HCP",
                 "entityId": "940676573928359519",
                 "entity": {
                     "addresses__v": [
                         {
                             "address_line_1__v": "7777 Southwest Fwy Ste
540",
                             "locality__v": "Houston",
                             "premise__v": "7777",
                             "thoroughfare__v": "Southwest Fwy",
                             "administrative_area__v": "US-TX",
                         }
                     ],
                     "email_1__v": "astrid.gonzales@gmail.com",
                     "vid__v": "940676573928359519",
                     "first_name__v": "Astrid",
                     "last_name__v": "Gonzales",
                     "specialty_1__v": "Peds Alias",
                     "primary_specialty_group__v": "G-PD",
                     "medical_degree_1__v": "MD",
                     ...
                 }
             },
             ...
         ]
     }
 }
```

Submit reference aliases

Use the following parameter to submit a Match API request using source aliases:

- `systemName`

Example request

```
POST https://{{DNS}}/api/{{version}}/match/?systemName=demo
```

Example POST data

```
{
     "entity_type": "HCP",
     "entity": {
         "first_name__v": "Astrid",
         "last_name__v": "G",
         "primary_country__v": "US",
         "specialty_1__v": "Ped Alias"
         "addresses__v": [{
             "administrative_area__v" : "TX"
         }]
     }
 }
```