Veeva Network

Veeva Network 25R1.1 Early Release Notes

May 2025

Contents

About these Release Notes

These Release Notes describe all features that will be included in Veeva Network 25R1.1.

RELEASE DATES

- **Sandbox release** (version 25R1.1) - Friday, May 23
- **Production release** (version 25R1.1.1) - Friday, June 6

SUBSCRIBE TO RELEASE NOTIFICATIONS

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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 Network Online Help

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

Browser requirements

Veeva Network is supported on the latest version of these browsers, as of their most stable version at the time of release:

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

Veeva Network is not supported on mobile devices.

What's new

The following key enhancements comprise the Veeva Network 25R1.1 minor release.

		ST	DS	DM	AD
Data Change Requests					
DCR Approval Rules	Define rules to ensure that specific changes are approved only by experienced Data Stewards.		●	●	●
Profiles					
Affiliation summary cards	The Hierarchy Type is removed from Parent and Child Affiliation summary cards.	●	●	●	●
Network Explorer					
Filters	Filter groups support one type of operator only (AND or OR).	●	●	●	●
Reporting					
DCR History	Advanced reporting users can run reports on the history of changes for DCRs.		●	●	●
Data Model					
4-byte characters	4-byte characters are supported for data loading, data change requests, and Network search.	●	●	●	●
Match					
Add Request Match Configuration	The default match rules are updated to reduce the potential for over matching for HCPs.			●	●
Vault CRM integration					
Data Launch Accelerator	A new wizard that helps you to deploy the initial Network Bridge setup so you can quickly begin using OpenData in your Vault CRM org.				●
Vault CRM Bridge Record Limit	The number of account records that can be upserted in each job has been increased.			●	●
Security					
IP Access Control	For added security, Administrators can define the allowed IP range for access to Network.				●

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

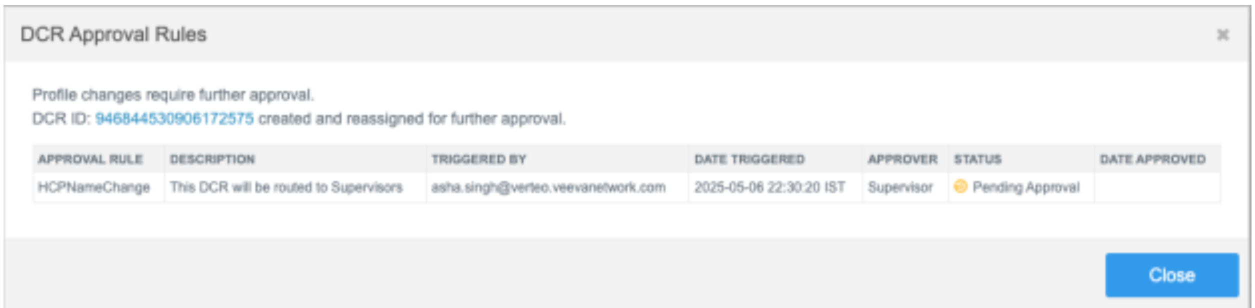
Data Governance - Specific updates for fields and reference data are provided in the *Veeva Network Data Governance* release notes for every minor and major Network release.

Data change requests

DCR approval rules

Administrators can define rules to ensure that specific changes require further review by experienced Data Stewards. For example, you can create a rule that only supervisors can approve changes on hospital or administrative HCO profiles because these changes can impact large HCO hierarchies.

Data Stewards can validate the information and accept or reject the changes, but the DCR is automatically assigned to more experienced users for further approval.



This feature is available by default. Administrators must define the approval rules.

Supported tasks

- Add requests
- Change requests (inbox tasks and Profile page updates)

Tasks not supported

- Suspect match tasks

Supported objects

All Veeva standard objects and custom objects that are enabled in your Network instance.

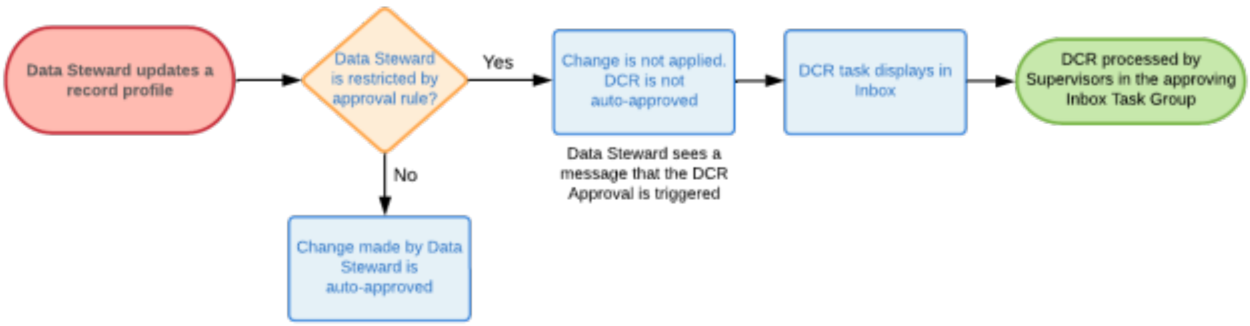
Approval process for data stewardship

The approval rules can be triggered when Data Stewards are processing changes on the profile page and in the inbox.

Approval process for changes made on a Profile page

When Data Stewards update a field on the Profile page and apply the change, the DCR approval rules are evaluated to see if the changes can be applied.

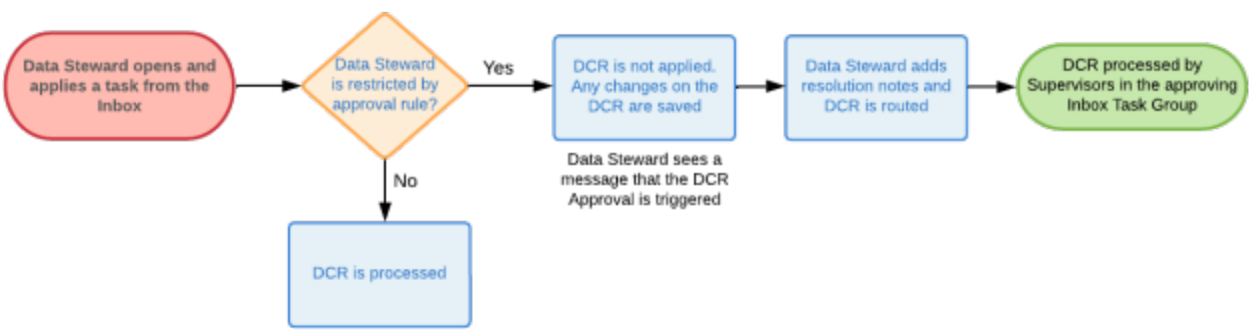
If the Data Steward is not restricted from making the update, the change is automatically approved.



If the change triggers the DCR approval process, the updates are not applied and the DCR is routed for further approval.

Approval process for changes when processing inbox tasks

Data Stewards can validate the information and accept or reject changes on add and change requests. If the change triggers a DCR approval rule, the task will be routed to supervisors to process.

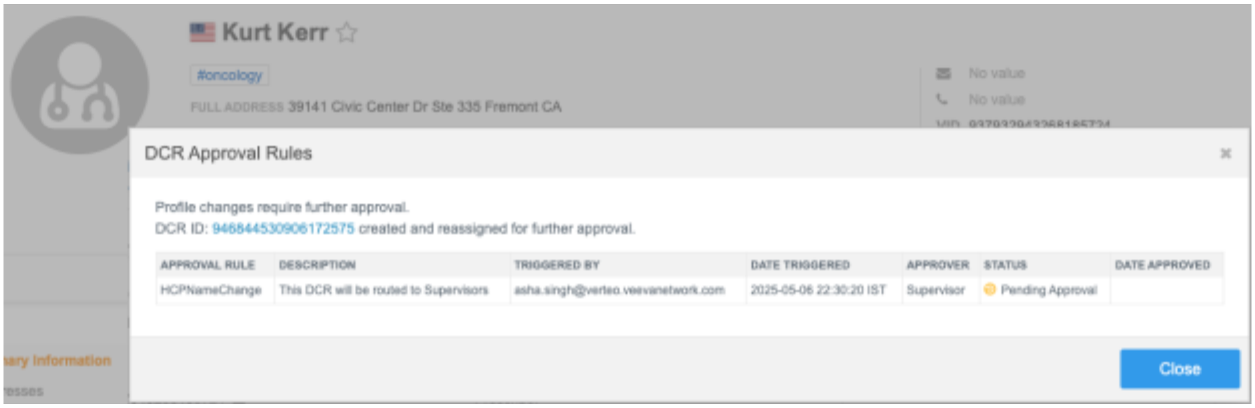


When they click **Apply**, they can add a resolution note, as usual.

Tip: Create a DCR Note to add resolution notes there as well. For example, add the phone number or website used to confirm the DCR so supervisors can view the validation information if the task requires additional approval.

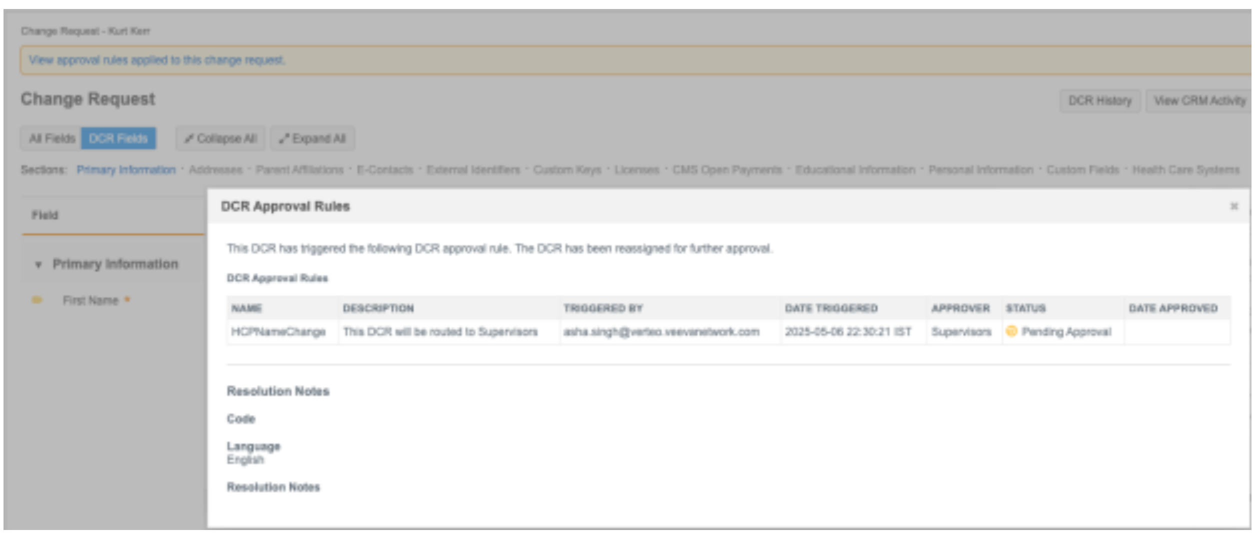
Approving DCRs

When changes trigger a DCR approval rule, Data Stewards will see the **DCR Approval Rules** dialog. It displays details about the rule and the approver.



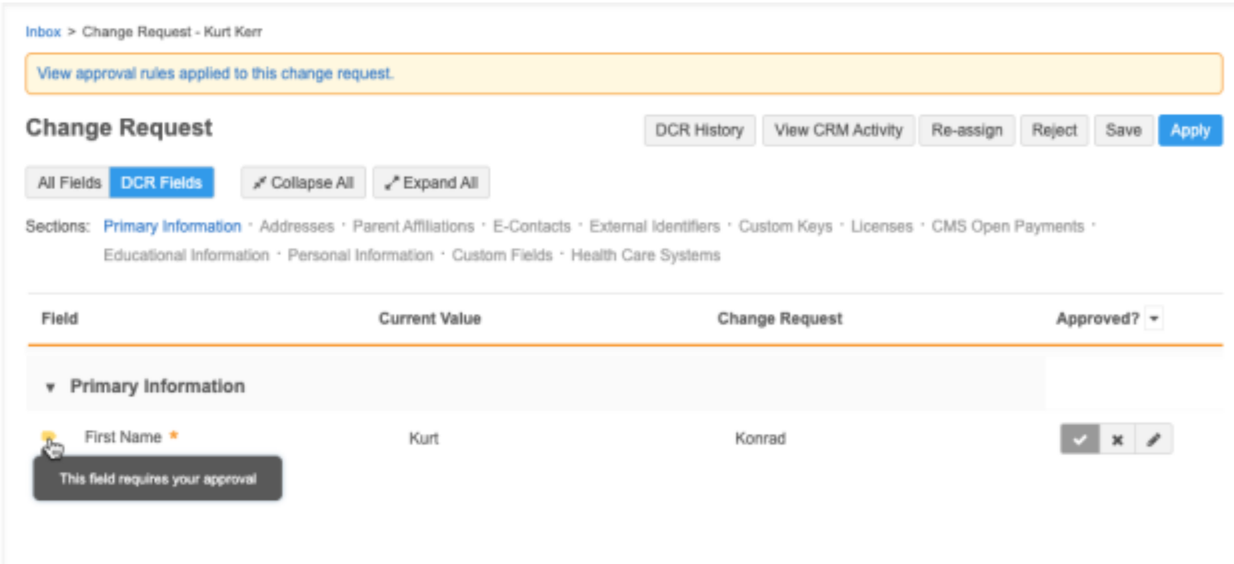
- Click the **DCR ID** link to open the task.

There are no action buttons on the task because it cannot be accepted or rejected by the Data Steward who submitted the change.



When Supervisors open the task from their inbox, they can do the following:

- Identify the fields that require approval because they are highlighted.
- Assign the task to themselves or to another user in the same inbox task group.
- Use the **DCR History** to view all changes that have been made for the task through the approval process.
- View the last updated resolution notes that have been applied by other users to help verify the DCR.
- Accept, reject, or edit the DCR and apply the changes.



Multiple levels of approval

Rules are defined for objects by country. An object can have multiple rules for a country. When there is more than one rule enabled for the object, all rules will run to validate.

Example scenario

The following DCR approval rules are defined for HCPs for the United States.

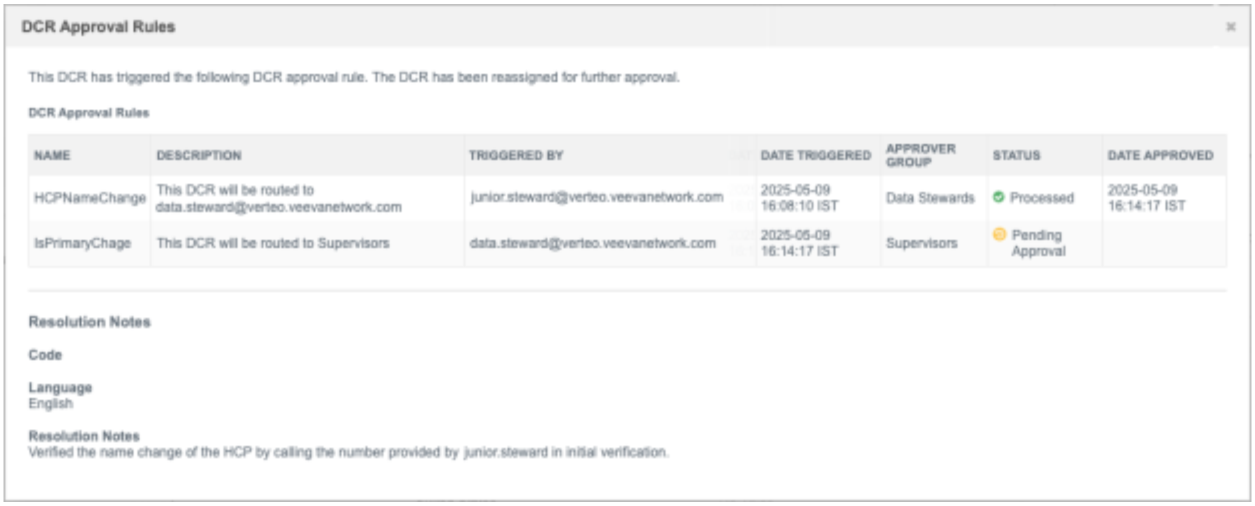
- hcp_status__v - Changes must be approved by experienced Data Stewards.
- primary_address__c - Changes must be approved by Supervisors.

If a DCR was submitted with changes to these fields, and it is assigned to a newer Data Steward, it will require multiple levels of approval before the DCR is fully processed.

Rule	Field Approval	Initiator	Assigned to Approver
1	hcp_status_v	Junior Data Steward	Data Stewards
	primary_address__c		
2	primary_address__c	Data Stewards	Supervisors
3	primary_address__c	Supervisors	(end)

After the Junior Data Steward verifies the updates, the DCR approval rules are triggered.

- **HCP Status** - The DCR is assigned to Data Stewards to approve the `hcp_status__v` change.
- **Primary Address** - Then, it is assigned to Supervisors to approve the `primary_address__c` change.



Process for defining approval rules

The process uses inbox task groups, user groups, and DCR Approval Rules.

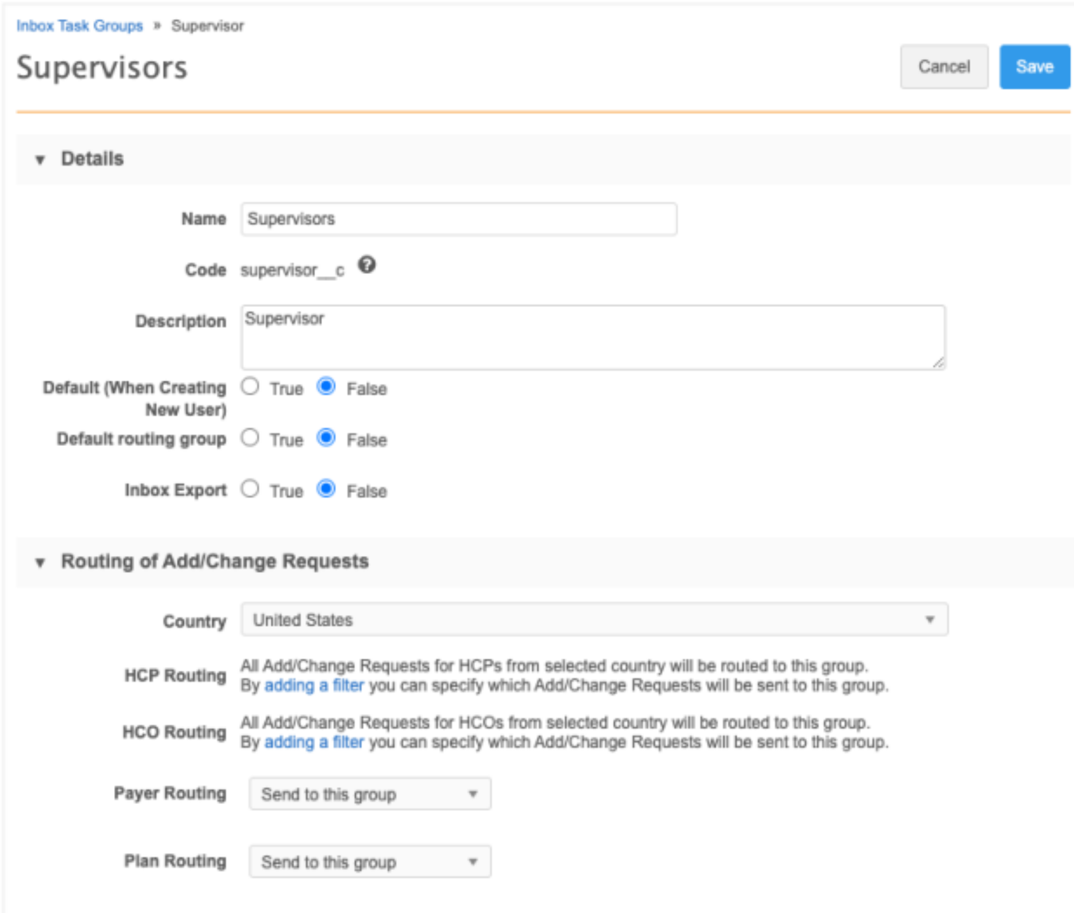
1. **Inbox task group** - Create inbox task groups for experienced Data Stewards or supervisors. These are users that can approve the tasks that triggered the DCR approval rules.
2. **User group** - Create a user group for Data Stewards users that will be restricted from approving or rejecting changes on specific records.
3. **DCR approval rule** - Define the conditions (object, country, fields) that will trigger additional approval.

Create an inbox task group

Administrators can create a group for Supervisors or experienced Data Steward users that can approve all DCR changes.

To create a group:

1. In the Admin console, click **Users & Permissions > Inbox Task Groups**.
2. Click **Add New Group**.
3. Add a meaningful **Name** and **Description**.



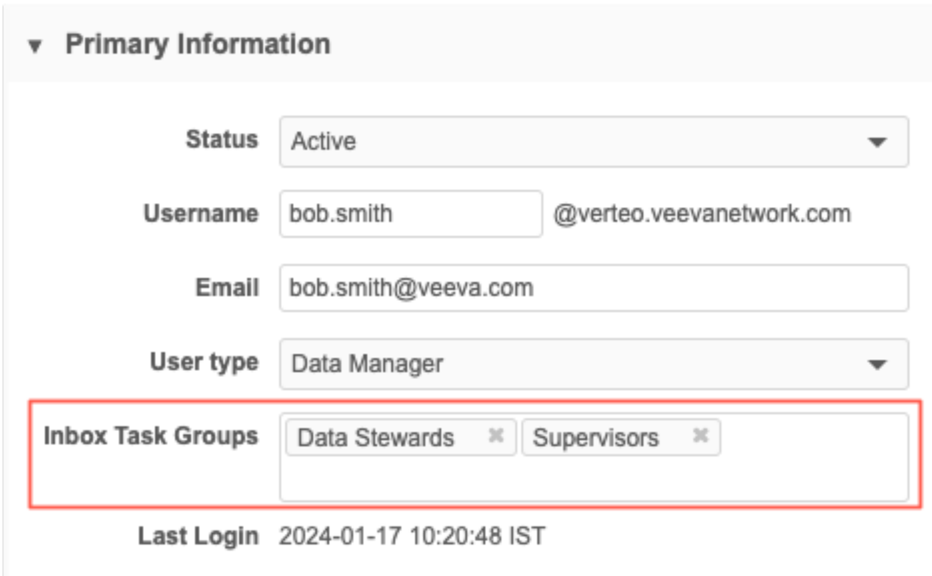
4. Choose the following setting values:
   - **Default (When Creating New User)** - Choose **False**.
   - **Default routing group** - Choose **False**.
   - **Inbox Export** - Choose **False**. (For the Supervisor group, you might choose **True**.)
5. In the **Routing of Add/Change Requests** section, select the country that the group applies to.

   Add **HCP Routing** and **HCO Routing** filters if required.
6. **Save** your changes.

Assign inbox task groups to users

Administrators can add the inbox task group to experienced Data Stewards or supervisors.

1. In the Admin console, click **Users & Permissions > Users**.
2. Open a user profile.
3. In the **Inbox Task Groups** field, add the new group.

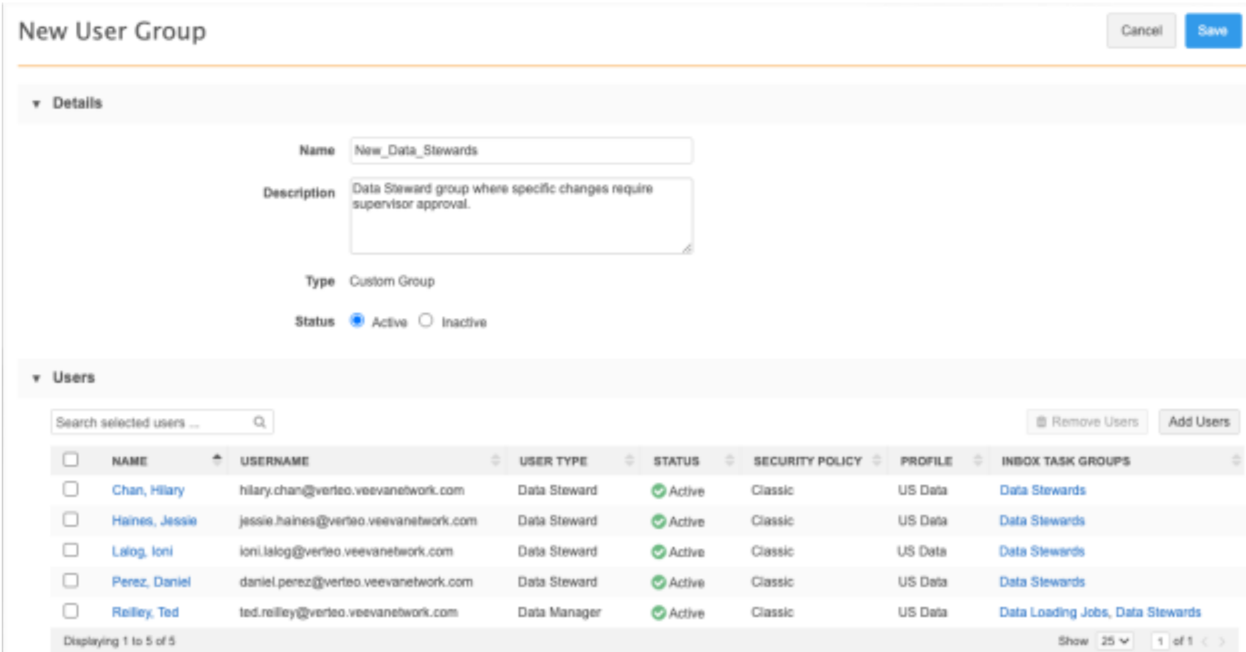


4. **Save** your changes.

Create a user group

Administrators can create a user group to contain the Data Steward users that will be restricted from approving or rejecting specific changes on records.

1. In the Admin console, click **Users & Permissions > User Groups**.
2. Click **New User Group**.
3. Type a relevant **Name** and **Description**.
4. In the **Users** section, click **Add Users** and select the Data Stewards that should not have access to process specific changes on records.
5. **Save** your changes.



Create a rule

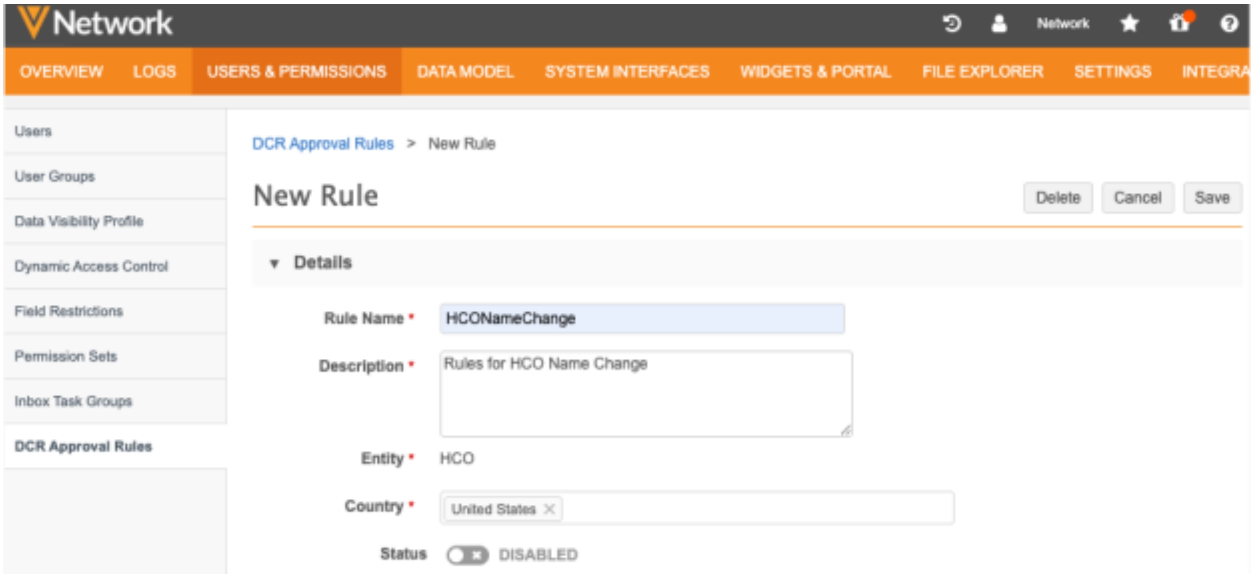
The DCR approval rule contains the fields and values that determine the records and changes that require approval from more experienced Data Stewards.

1. In the Admin console, click **Users & Permissions > DCR Approval Rules**.
2. In the object row, click **Add Rule**.
3. On the new rule page, define the following details:
    - **Rule Name** and **Description** - Type a meaningful name and description.
    - **Entity** - Specify the data model object for this rule.

      HCPs, HCOs, and custom main objects are supported.
    - **Countries** - List the countries affected by this rule.
    - **Status** - By default, the rule is not enabled.

    Example

    Create a rule that prevents junior Data Stewards from approving changes to HCO names because these changes can impact HCO hierarchies.



4. **DCR Approval Rules** - Define the conditions that will trigger the approval rule.

- **Conditions** - Expand the **Fields** list and select the fields. Choose **All Fields**, or individual fields.

  Click **Add Field** to select multiple fields.

  Any changes to these fields will trigger the rule.

- **Filters** (*optional*) - Define filters to narrow the conditions that will trigger the approval rule.
  - **Field** - Choose the field.

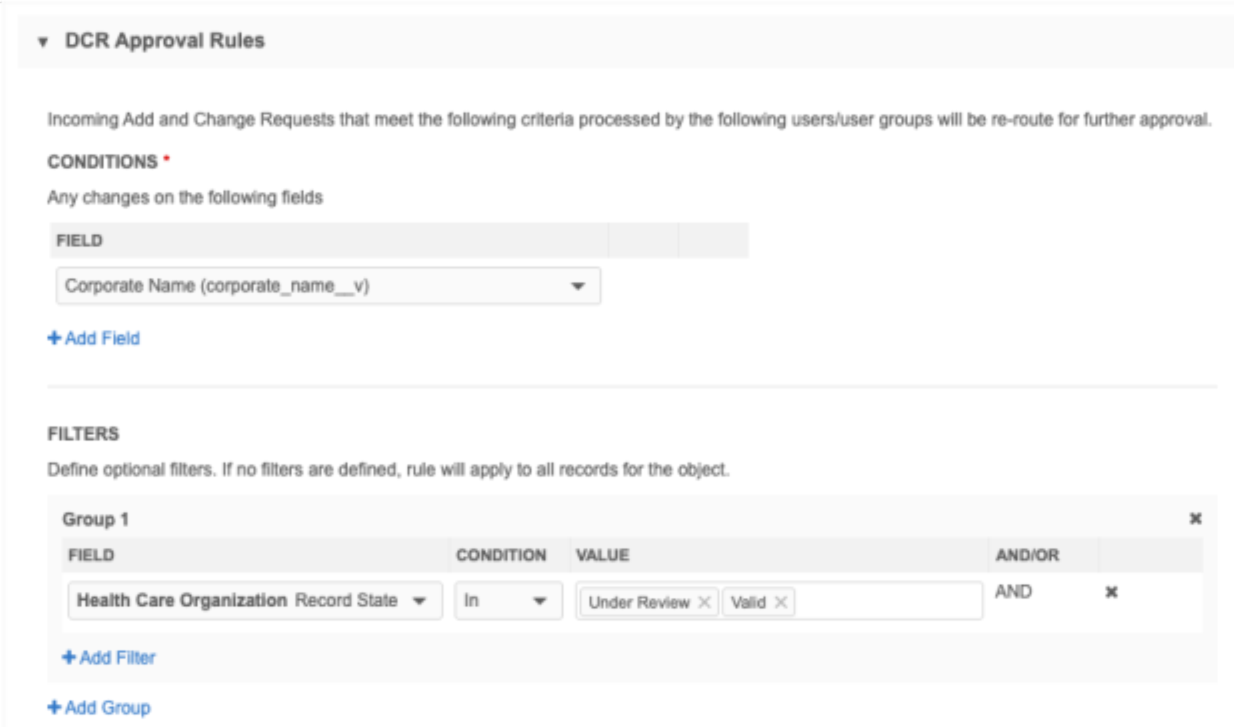
    All fields for the main object and related sub-objects display in the list.

  - **Condition** - Choose the appropriate condition.
  - **Value** - Select the values.

Note: If no filters are defined, the rule will apply to all records for the object.

Example

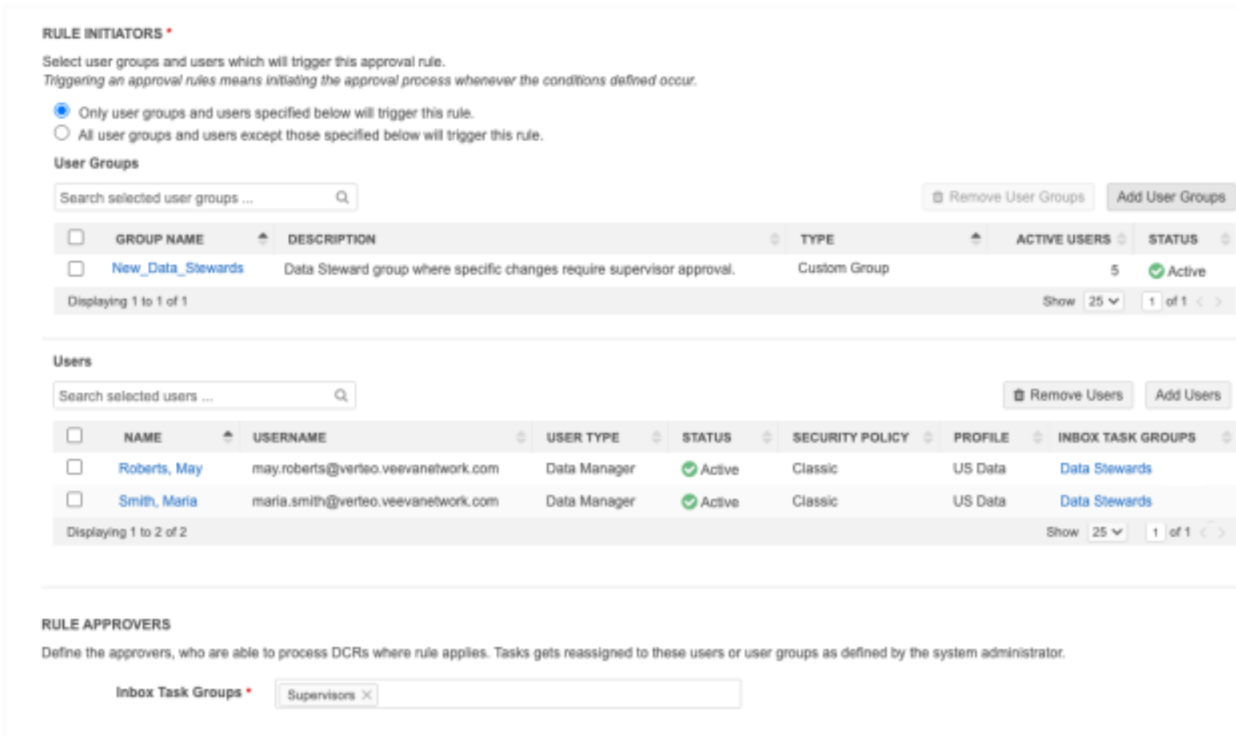
Add a condition that changes to the `corporate_name__v` field will trigger the rule on HCO records. Then, apply a record state filter so the rule is triggered only if the change occurs on a *Valid* or *Under Review* record.



5. **Rule Initiators** - Define the users that will trigger the approval process when the defined conditions occur.
    - **Only user groups and users specified below will trigger this rule** - Include the users that will trigger the rule.
    - **All user groups and users except those specified below will trigger this rule** - Exclude the users that will trigger the rule.

      For example, you might use this option to ensure that all users except Supervisors are restricted from promoting candidate records.

   Add the applicable user groups and users.



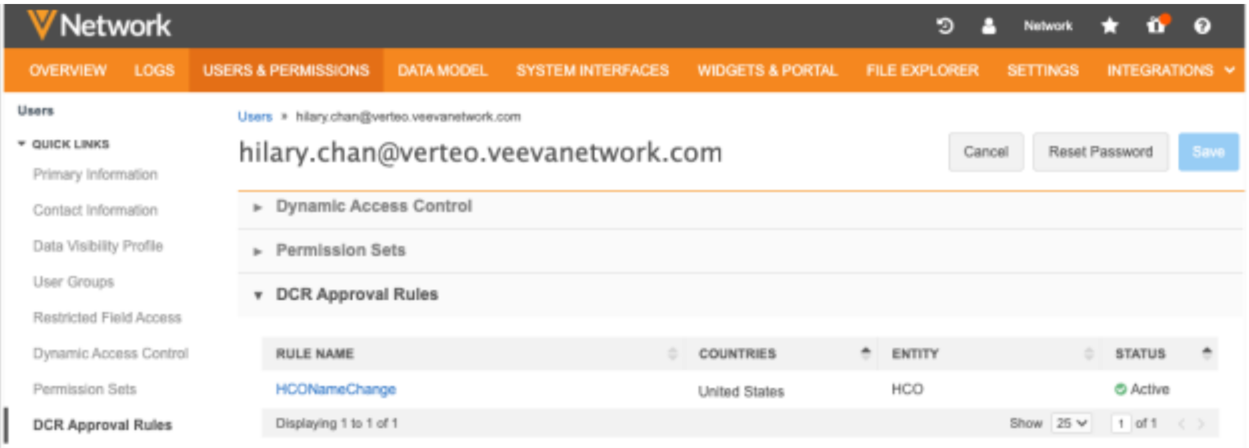
6. **Rule Approvers** - Add the inbox task group for the users that can approve or reject the DCR. The add or change request will be routed to the inbox task group.

> **Important**: Users designated as both a **Rule Initiator** (with approval restrictions) and a **Rule Approver** will always be able to approve the DCR; the approver permission takes precedence.
>
> For rules applying to multiple countries, the DCR will be routed to the approver's inbox task group that matches the record's country. If no matching approver is found for a specific country the DCR rules will not apply to that record.

7. **Save** the rule.
8. When you are ready for the DCR approval process to begin, **Enable** the rule.

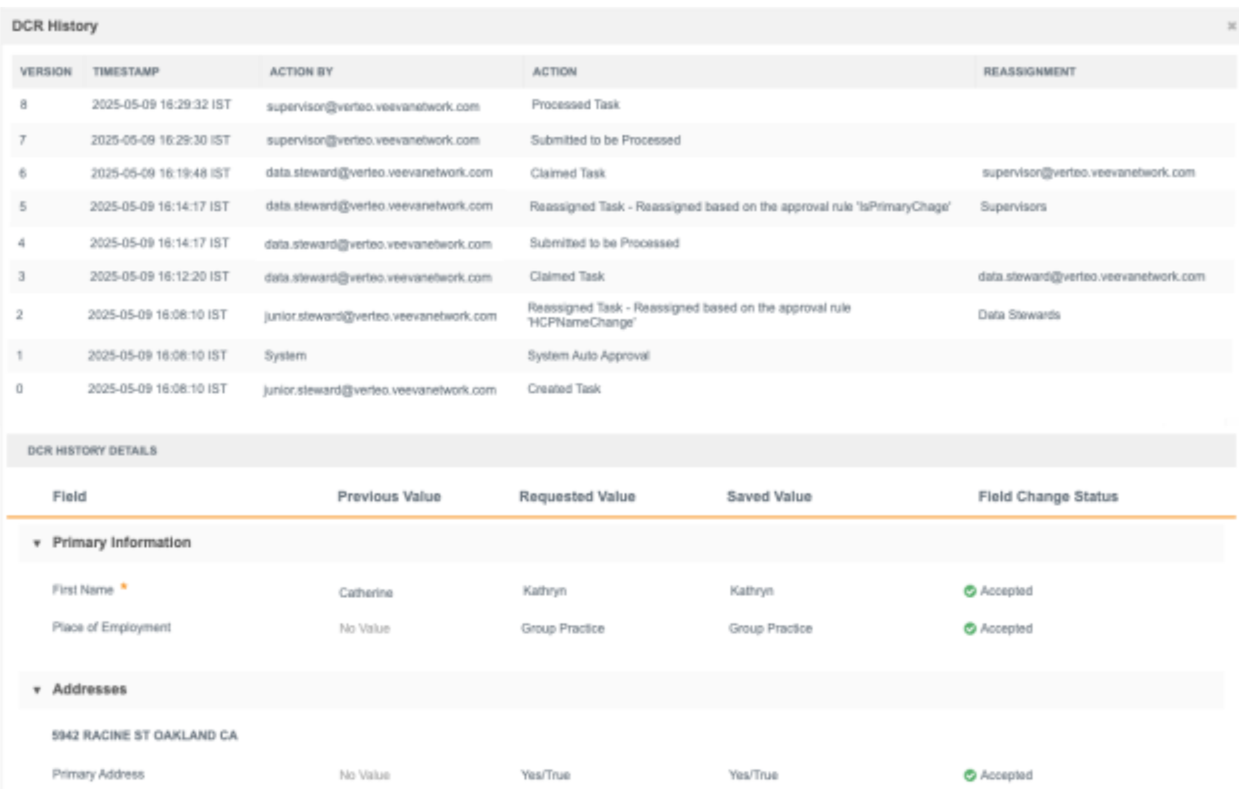
User page updates

On the User page, the **DCR Approval Rules** section displays the rules that can be triggered by the user as a Rule Initiator.



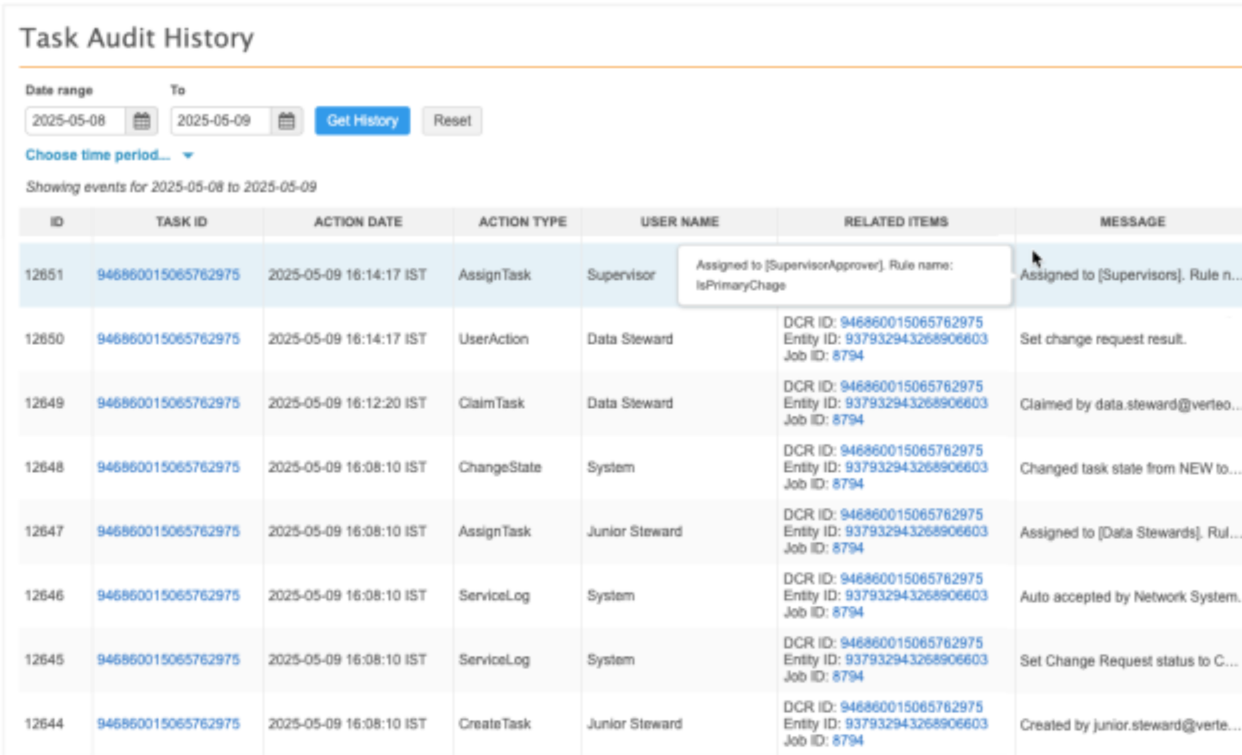
DCR History

Use the **DCR History** to track the approval process as well as all changes and actions taken on a DCR.



Logs

The **Task Audit History** log tracks all actions made by the approval rules.


Task Audit History

Date range 2025-05-08 To 2025-05-09 Get History Reset

Choose time period...

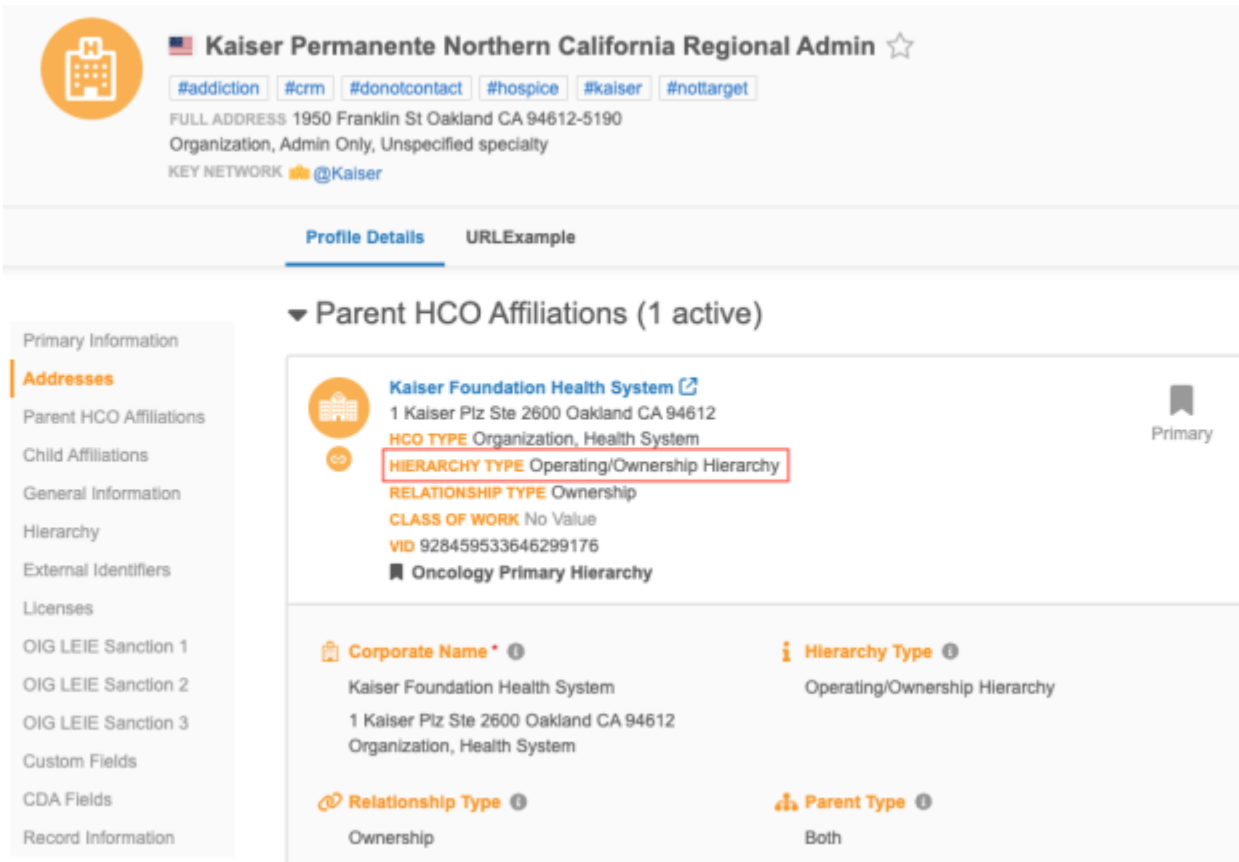
Showing events for 2025-05-08 to 2025-05-09

ID	TASK ID	ACTION DATE	ACTION TYPE	USER NAME	RELATED ITEMS	MESSAGE
12651	946860015065762975	2025-05-09 16:14:17 IST	AssignTask	Supervisor	Assigned to [SupervisorApprover]. Rule name: isPrimaryChage	Assigned to [Supervisors]. Rule n...
12650	946860015065762975	2025-05-09 16:14:17 IST	UserAction	Data Steward	DCR ID: 946860015065762975 Entity ID: 937932943268906603 Job ID: 8794	Set change request result.
12649	946860015065762975	2025-05-09 16:12:20 IST	ClaimTask	Data Steward	DCR ID: 946860015065762975 Entity ID: 937932943268906603 Job ID: 8794	Claimed by data.steward@verteo...
12648	946860015065762975	2025-05-09 16:08:10 IST	ChangeState	System	DCR ID: 946860015065762975 Entity ID: 937932943268906603 Job ID: 8794	Changed task state from NEW to...
12647	946860015065762975	2025-05-09 16:08:10 IST	AssignTask	Junior Steward	DCR ID: 946860015065762975 Entity ID: 937932943268906603 Job ID: 8794	Assigned to [Data Stewards]. Rul...
12646	946860015065762975	2025-05-09 16:08:10 IST	ServiceLog	System	DCR ID: 946860015065762975 Entity ID: 937932943268906603 Job ID: 8794	Auto accepted by Network System.
12645	946860015065762975	2025-05-09 16:08:10 IST	ServiceLog	System	DCR ID: 946860015065762975 Entity ID: 937932943268906603 Job ID: 8794	Set Change Request status to C...
12644	946860015065762975	2025-05-09 16:08:10 IST	CreateTask	Junior Steward	DCR ID: 946860015065762975 Entity ID: 937932943268906603 Job ID: 8794	Created by junior.steward@verte...

Profiles

To streamline the summary cards, the **Hierarchy Type** is removed from Parent and Child Affiliation cards.

This information remains easily accessible in the expanded details when you click on the summary card.

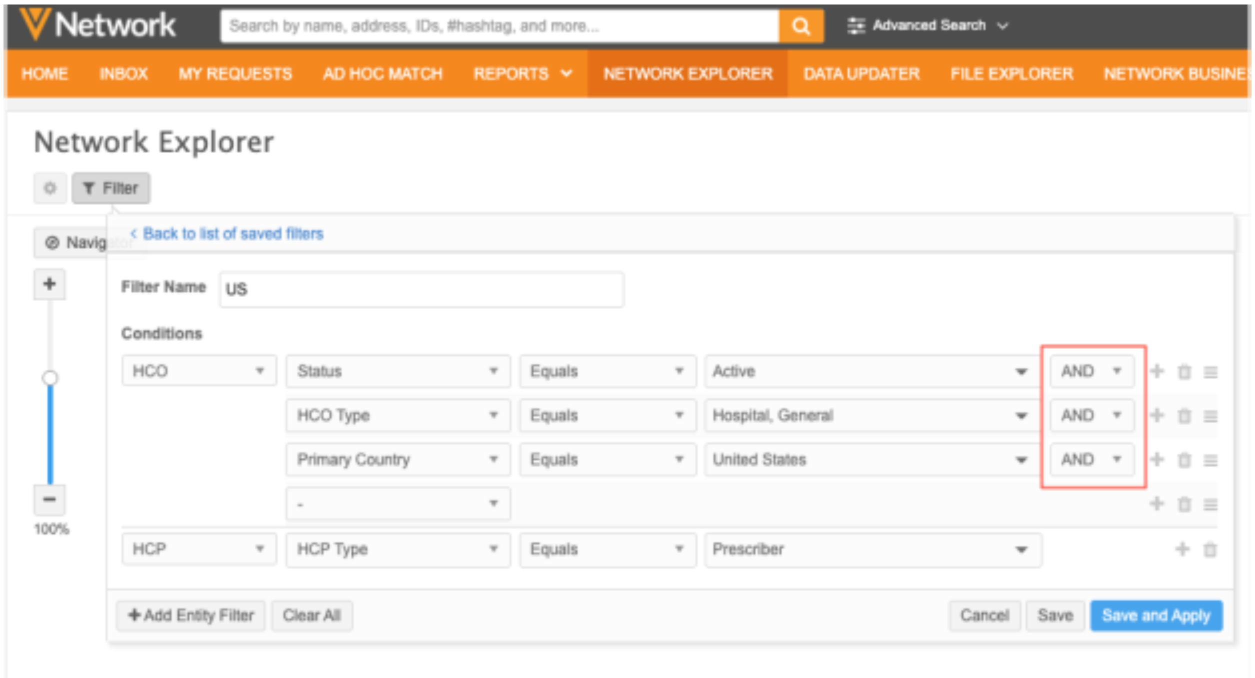


This change is enabled by default in your Network instance. The **Hierarchy Type** is removed for all records regardless of the profile layout that is used.

Network Explorer

CHANGES TO FILTERS

Filters created for Network Explorer now support one type of operator only. Filter groups can use the AND operator or the OR operator. Previously, entity filter groups could use both operators.

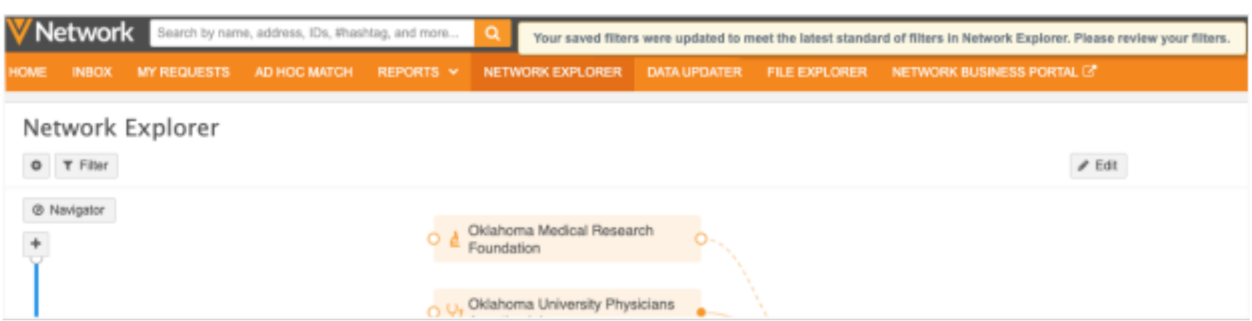


This change is enabled by default in your Network instance.

Existing filters

Saved filters that contain both operators are updated by default to use the first operator in the filter group. For example, if the first operator in the condition uses an AND operator, any OR operators in the group will be changed to AND.

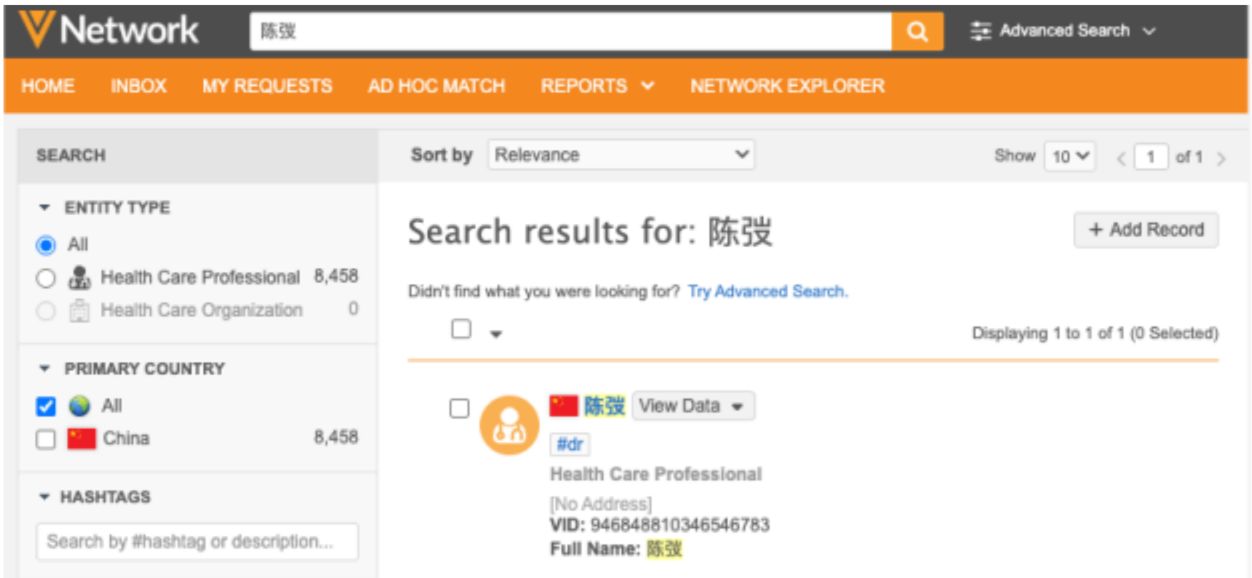
If you have saved filters that contain both operators, a message displays the first time you access Network Explore to advise you that the filters have been updated. Review the filters and make any required changes.



Data model

4-BYTE CHARACTERS

Support is added for 4-byte characters used in Chinese and Japanese languages.



Supported activities

- **Data load** - Loading 4-byte characters into Network through source subscriptions and the Data Updater.
- **DCRs** - Including 4-byte characters on add and change requests.
- **Search** - Using 4-byte characters to search for records.

Enable the feature

This enhancement is not by default in your Network instance. Contact Veeva Support to enable 4-byte character support.

Reporting

DCR History

Advanced reporting users can now query the details available in the **DCR History** for inbox tasks to report on all changes that occurred on DCRs.

This feature is not enabled by default.

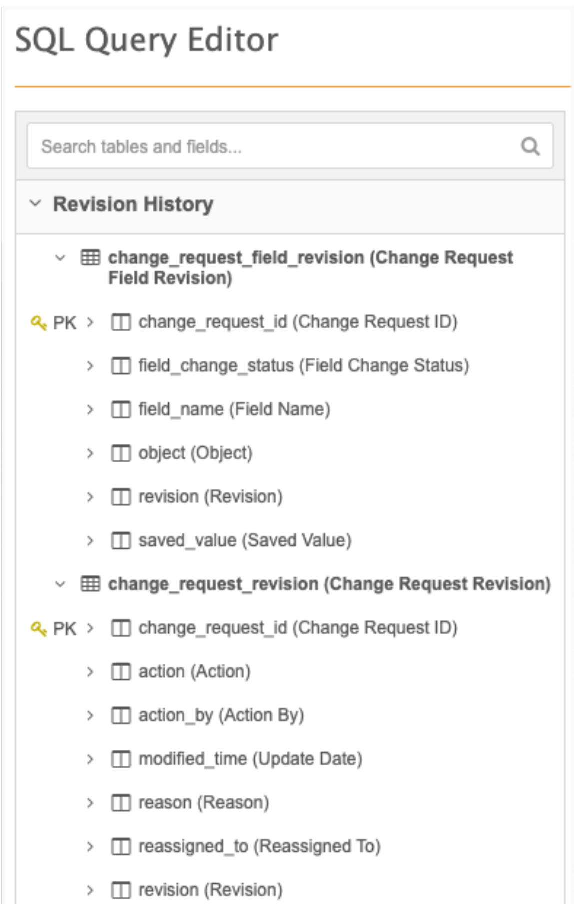
Enable the feature

1. In the **Admin** console, click **Settings > General Settings**.
2. Click **Edit**.
3. Select the **DCR History Reporting** setting.
4. **Save** your changes.

Reports can now be run on the change request revision tables. Regardless of when the feature is enabled, revision data is available starting from December 2024.

Reporting tables

Two new reporting tables are available in the **Revision History** section in the **SQL Query Editor**.

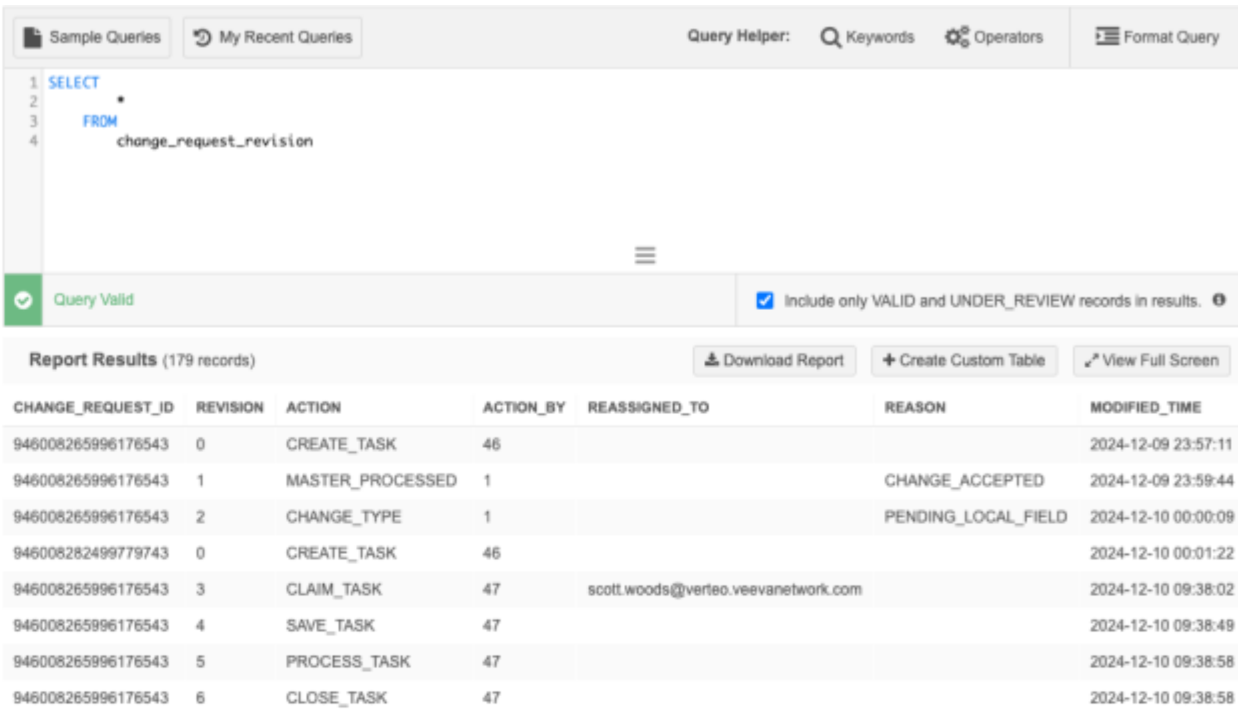


Change Request Revision (change_request_revision)

This table contains the following columns:

- Change Request ID - The task ID.
- Revision - The version assigned to each change.
- Action - The updates applied to the task.
- Action By - The user that made the change.
- Reassigned To - The task was assigned to a user.
- Reason - The reason the version changed.
- Modified Time - The time that the change was made.

Example



CHANGE_REQUEST_ID	REVISION	ACTION	ACTION_BY	REASSIGNED_TO	REASON	MODIFIED_TIME
946008265996176543	0	CREATE_TASK	46			2024-12-09 23:57:11
946008265996176543	1	MASTER_PROCESSED	1		CHANGE_ACCEPTED	2024-12-09 23:59:44
946008265996176543	2	CHANGE_TYPE	1		PENDING_LOCAL_FIELD	2024-12-10 00:00:09
946008282499779743	0	CREATE_TASK	46			2024-12-10 00:01:22
946008265996176543	3	CLAIM_TASK	47	scott.woods@verteo.veevanetwork.com		2024-12-10 09:38:02
946008265996176543	4	SAVE_TASK	47			2024-12-10 09:38:49
946008265996176543	5	PROCESS_TASK	47			2024-12-10 09:38:58
946008265996176543	6	CLOSE_TASK	47			2024-12-10 09:38:58

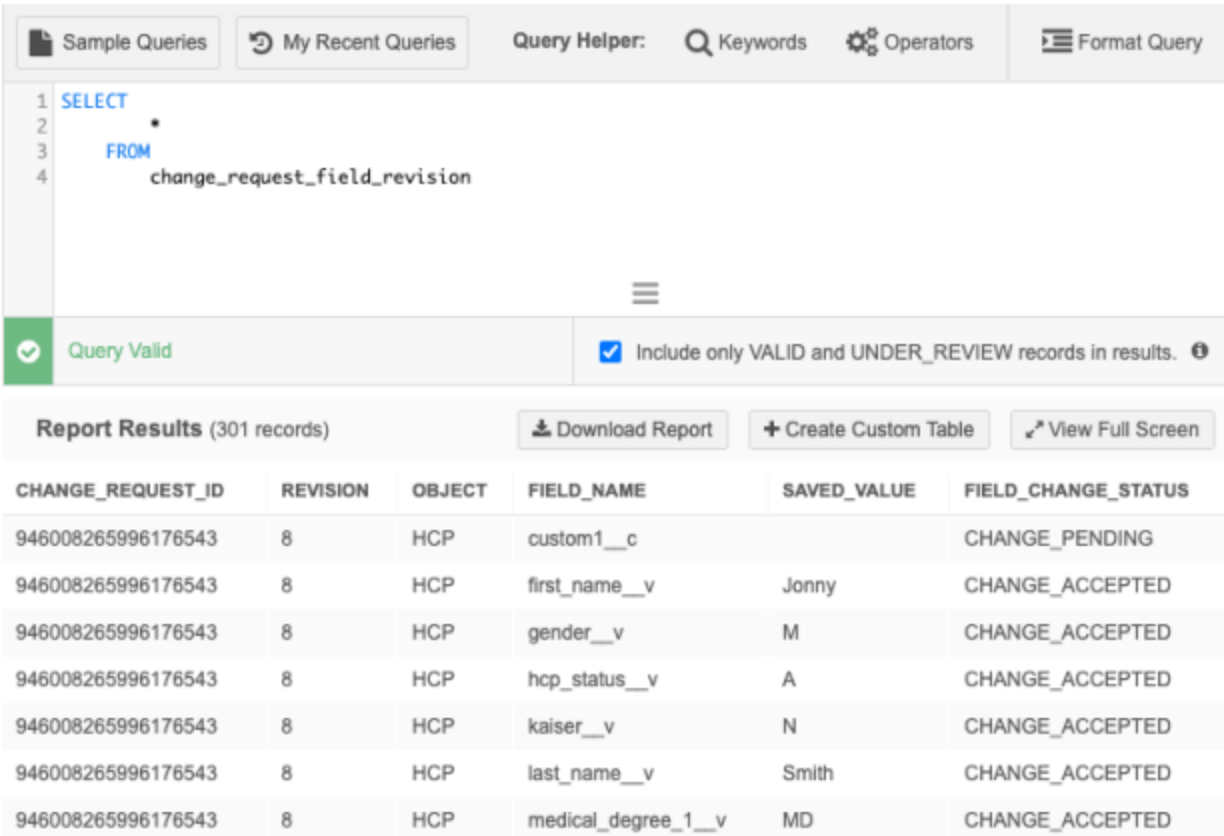
Change Request Field Revision (change_request_field_revision)

This table contains all changes that occurred to fields on a task for each revision.

It contains the following columns:

- Change Request ID - The Task ID.
- Revision - The version assigned to each change.
- Object - The data model object.
- Field Name - The field that was changed in that revision.
- Saved Value - The final value that was saved in the revision.
- Field Change Status - The status of the field for the revision.

Example



CHANGE_REQUEST_ID	REVISION	OBJECT	FIELD_NAME	SAVED_VALUE	FIELD_CHANGE_STATUS
946008265996176543	8	HCP	custom1__c		CHANGE_PENDING
946008265996176543	8	HCP	first_name__v	Jonny	CHANGE_ACCEPTED
946008265996176543	8	HCP	gender__v	M	CHANGE_ACCEPTED
946008265996176543	8	HCP	hcp_status__v	A	CHANGE_ACCEPTED
946008265996176543	8	HCP	kaiser__v	N	CHANGE_ACCEPTED
946008265996176543	8	HCP	last_name__v	Smith	CHANGE_ACCEPTED
946008265996176543	8	HCP	medical_degree_1__v	MD	CHANGE_ACCEPTED

Example query

Use this query to view the time that Veeva OpenData processed DCRs.

```
SELECT
         change_request_id,
         revision,
         modified_time,
         ACTION
     FROM
         change_request_revision
     WHERE
         ACTION = 'MASTER_PROCESSED'
```

Results

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

```
SELECT
        change_request_id,
        revision,
        modified_time,
        ACTION
    FROM
        change_request_revision
    WHERE
        ACTION = 'MASTER_PROCESSED'
```

Query Valid

Include only VALID and UNDER_REVIEW records in results.

Report Results (9 records)

Download Report | Create Custom Table | View Full Screen

CHANGE_REQUEST_ID	REVISION	MODIFIED_TIME	ACTION
946008253174385823	3	2024-12-10 09:19:17	MASTER_PROCESSED
940971896245849247	0	2025-04-01 23:07:29	MASTER_PROCESSED
946647703325183135	1	2025-04-01 23:14:34	MASTER_PROCESSED
946691358070934687	1	2025-04-09 16:36:22	MASTER_PROCESSED
946008265996176543	1	2024-12-09 23:59:44	MASTER_PROCESSED
946008282499779743	1	2024-12-10 10:02:19	MASTER_PROCESSED
945183853701172383	0	2025-04-01 22:52:15	MASTER_PROCESSED

For more details about the available revision data and actions that you can report on, see the DCR History topic in the *Veeva Network Online Help*.

Match

ADD REQUEST MATCH RULES

The default match rules used by add requests and change requests are improved to reduce the potential for over matching.

This enhancement is enabled by default in your Network instance.

Countries

Changes will be made to the following countries:

- EMEA region
- United States

View default match rules

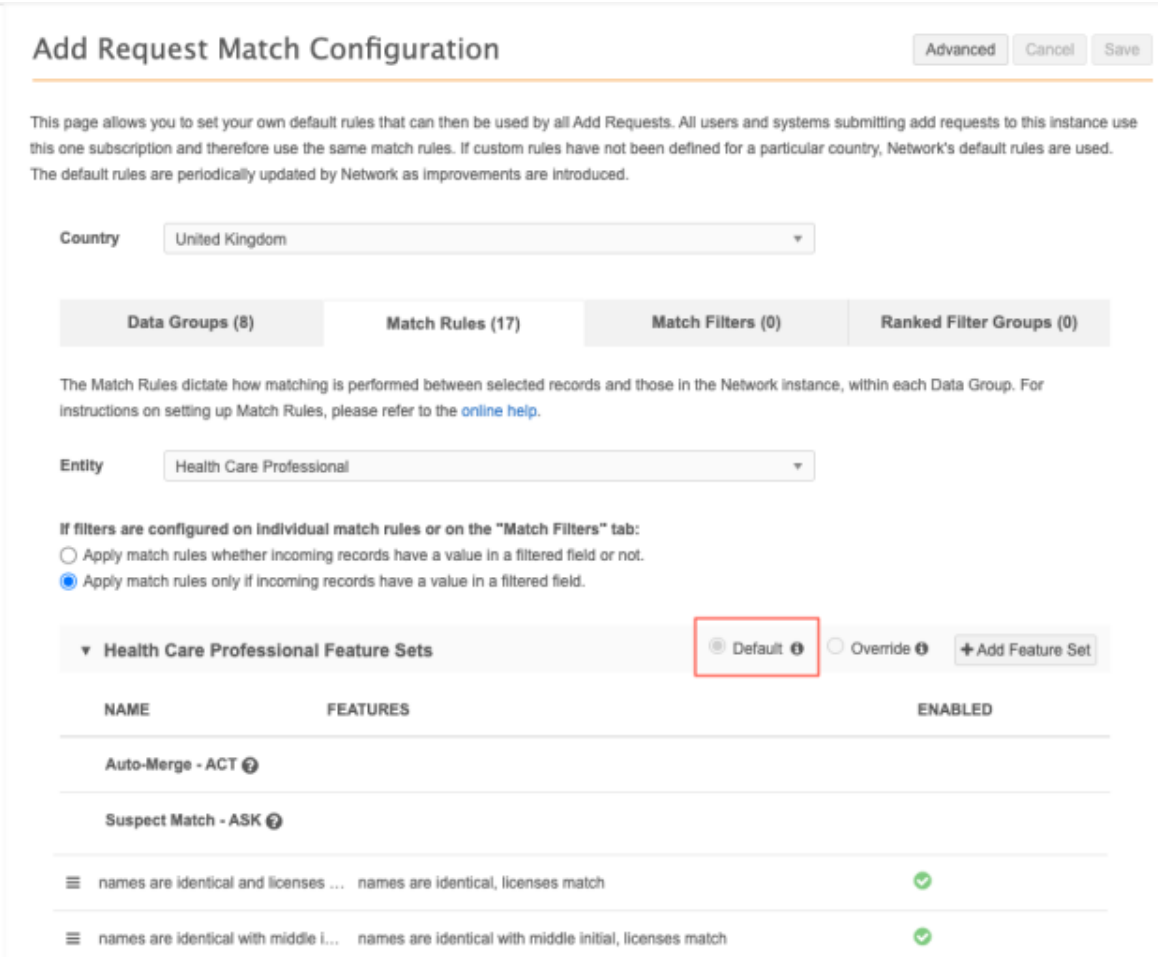
All countries supported by Veeva OpenData have default match rules for add and change requests.

To view the match rules:

1. In the Admin console, click **System Interfaces > Add Request Match Configuration**.
2. Choose a country.

   Data groups, match rules, and filters display for the country and selected entity.

3. If the **Default** is selected, the entity uses the default match rules. If **Override** is selected, the rules have been customized.



Custom match rules

If you have made changes to the default match rules, these updates will not impact your custom rules.

Vault CRM integrations

DATA LAUNCH ACCELERATOR

The Data Launch Accelerator helps you to quickly and easily set up the essential Network configurations for your Network - Vault CRM integration.

The wizard simplifies the initial implementation for new Network customers by creating these standard configurations:

- **OpenData country subscriptions** - Enables and configures the countries that you select.
- **OpenData country groups** - Creates a group for applicable OpenData regions so you can easily manage country schedules.
- **Network Bridges** - Creates the Vault CRM Multi-Country Bridge with a country-specific bridge configuration for the selected OpenData countries.
- **Target subscription** - Creates the subscription used by the Network Bridge.
- **Data Visibility Profiles** - Creates a DVP for each selected country.

After the initial implementation, the wizard can be used to add Bridge configurations for countries or to create the integration to another Vault CRM org.

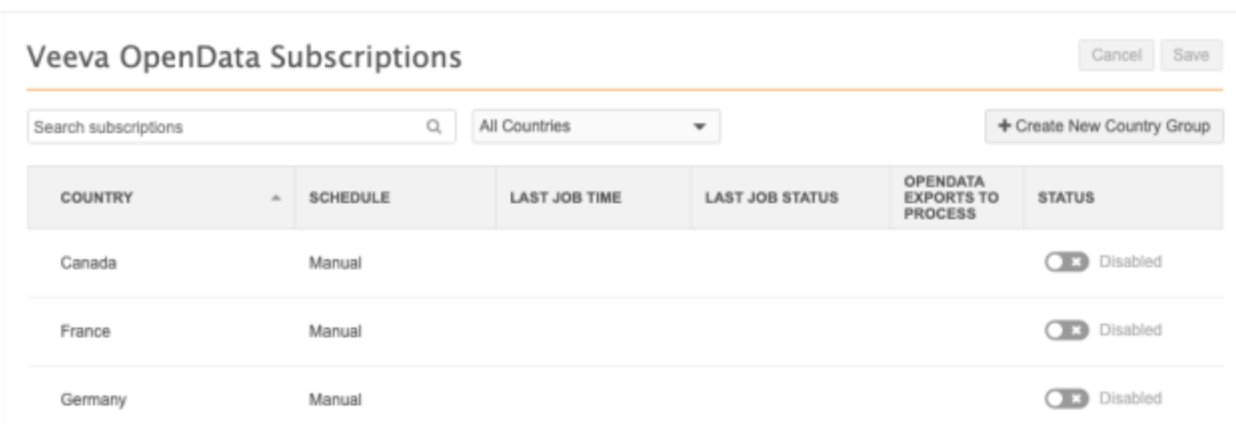
This feature is enabled by default in your Network instance.

Prerequisites

Before using the Data Launch Accelerator, Administrators should complete the following tasks in your Network instance.

OpenData country subscriptions

- **Active countries** - Confirm that the required countries are listed on the Veeva OpenData Subscriptions page **System Interfaces**.



If any required countries display in the **Other Veeva OpenData Country Subscriptions** section, contact Veeva Support.

- **Define records to download** - A working set must be created for each country. This is a .csv file that lists all the VIDs that you want to download when the country subscription runs.

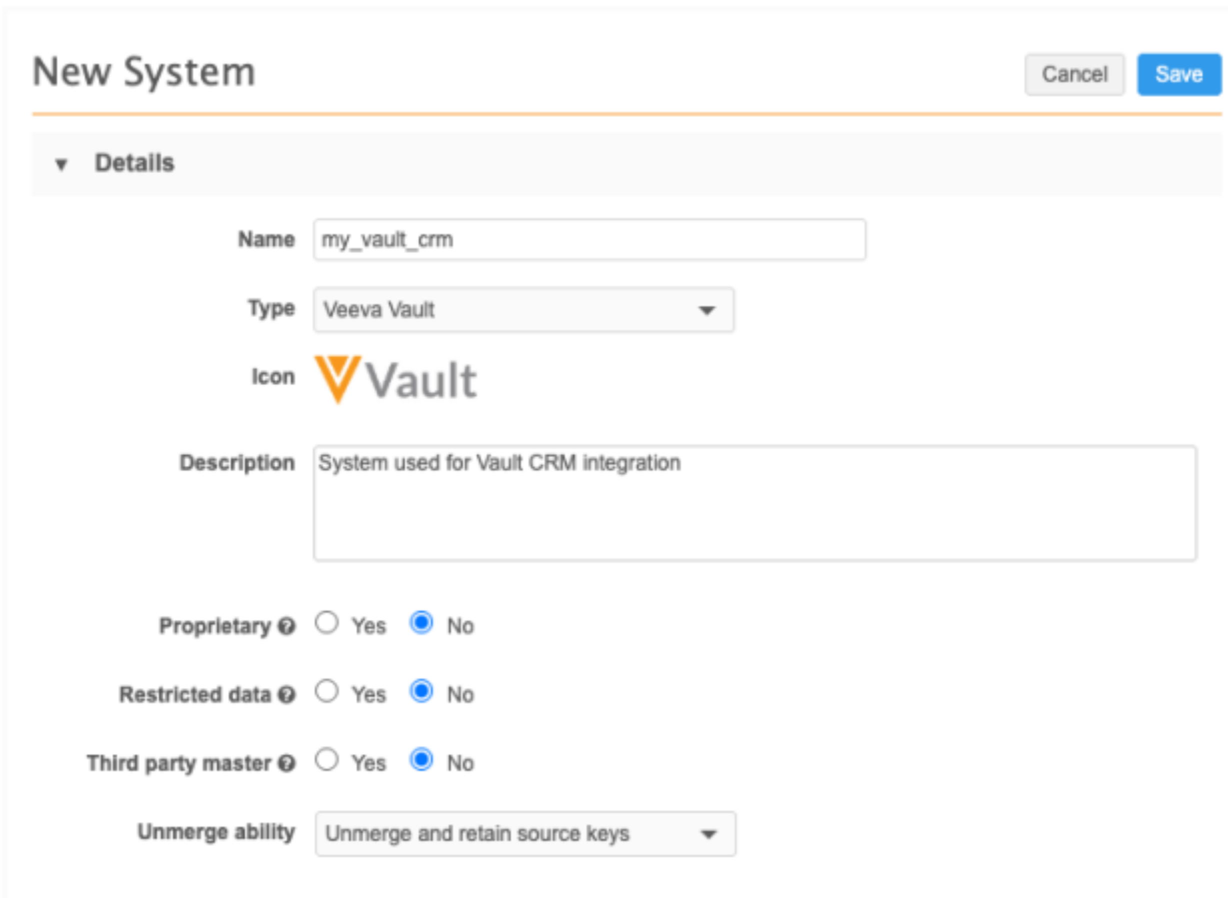
  Work with your Veeva Professional Services contact to create the working set.

System

- Create a system for Vault CRM (**System Interfaces > Systems**). The system is used to connect to your Vault CRM org.

  Note that the system **Type** must be set to **Veeva Vault**.

  Example Vault system

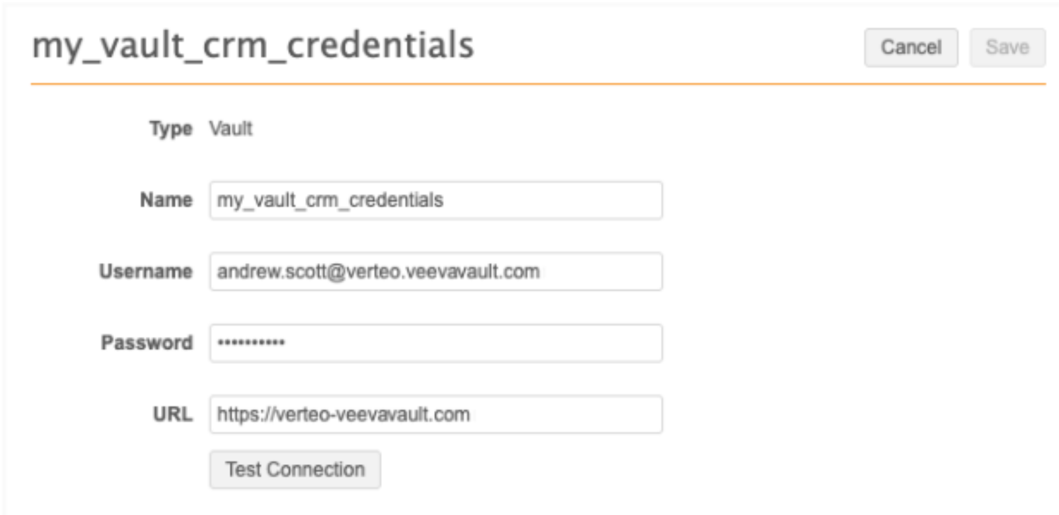


For details, see Adding Systems in the *Veeva Network Online Help*.

Credentials

- Create the Vault credentials. (**Settings > External Credentials**).

  The credential contains the Vault CRM org and integration user (created in Vault CRM). Note that the system **Type** must be set to **Vault**.



Run the Data Launch Accelerator

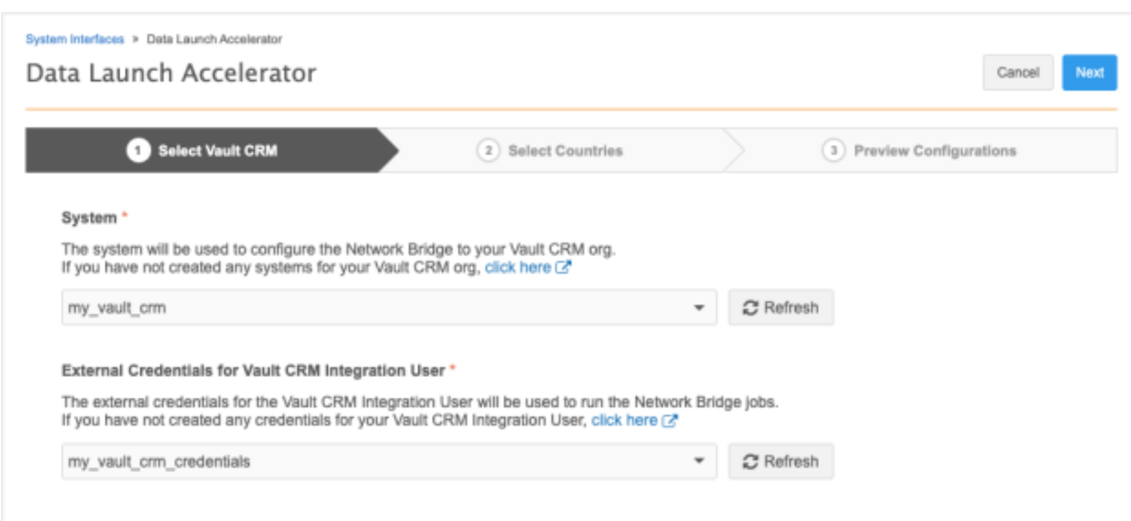
1. In the Admin console, click **System Interfaces > Data Launch Accelerator**.
2. On tab **1 - Select Vault CRM**, define the following settings:

   - **System** - Choose the source system for Vault CRM. This will be used by the target subscription and the Network Bridge.

     Systems defined as Veeva Vault systems display in the list.

   - **External Credentials** - Select the credentials for the Vault CRM Integration User that will run the Network Bridge jobs.

     The list displays all Vault credentials configured in your Network instance.

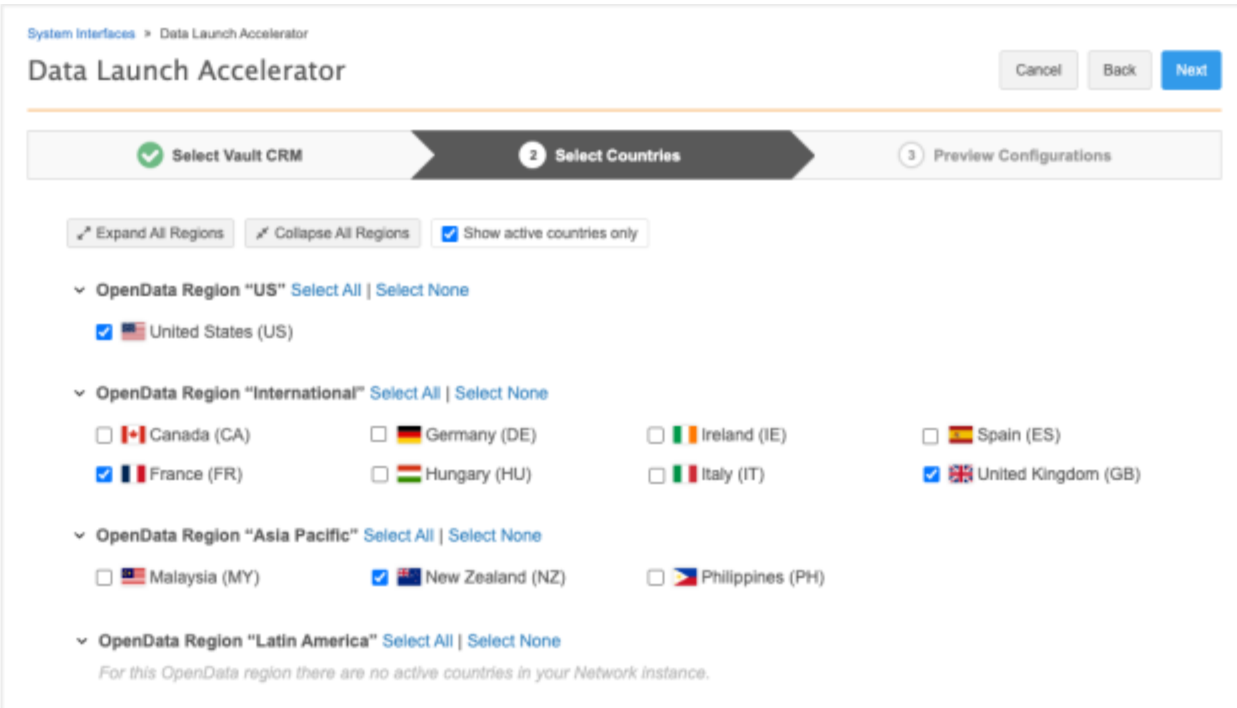


3. Click **Next**.

4. On tab **2 - Select Countries**, select each country to configure for Vault CRM.

   The countries are listed by OpenData region:

   - US
   - International - Canada, Europe, Middle East, Africa
   - Asia Pacific
   - Latin America

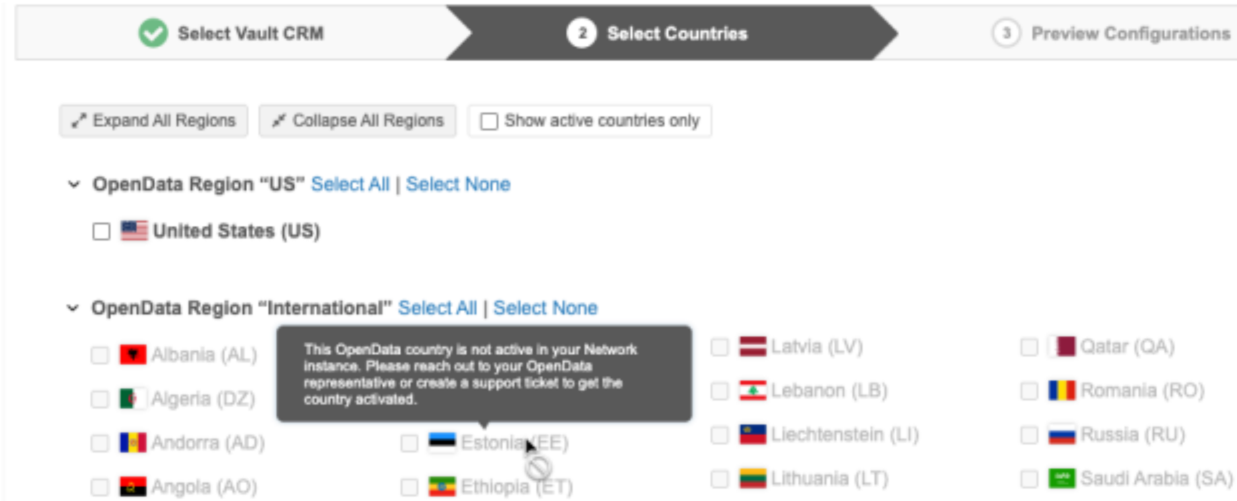


By default, only active countries display. These are countries that are ready to be enabled in your Network instance.

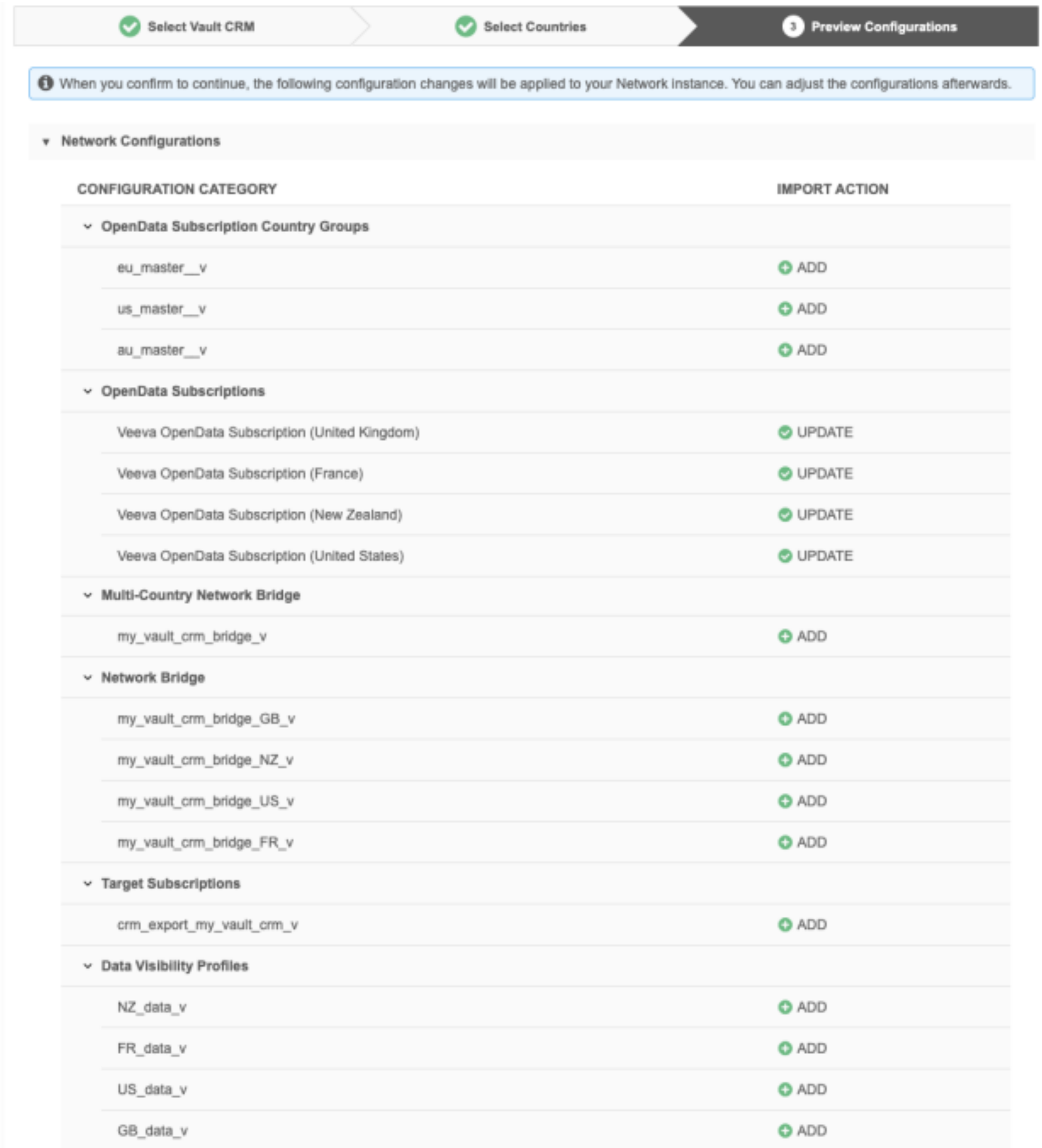
View all countries

To see all OpenData countries, clear the **Show active countries only** setting.

Hover over an inactive country to display a tooltip that explains why the country cannot be enabled.



5. Click **Next**.
6. On tab **3 - Preview Configurations**, review the configurations the Data Launch Accelerator will create in your Network instance.



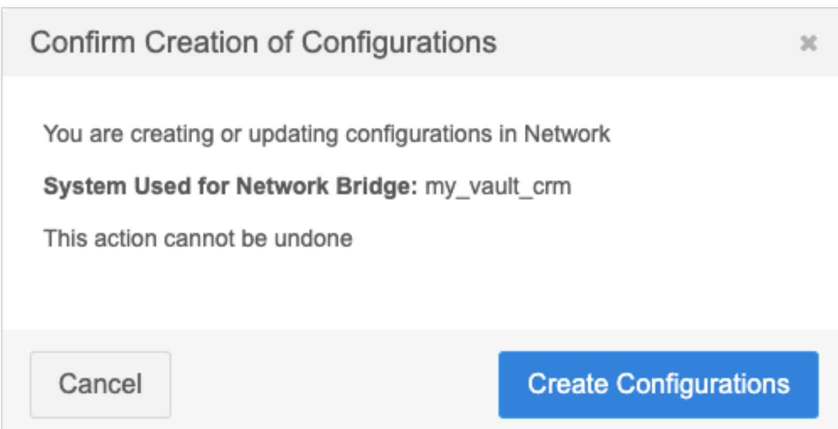
Configurations

For initial implementations, the **Action** will be either an **Add** or an **Update**.

When you run the wizard to add countries or connect to a different Vault CRM org, some actions will be **Update** or **Skip** because the configurations were previously created. For details, see the *Using the wizard after the initial implementation* section below.

Configuration	Action	Description
OpenData Subscription Country Groups	Add	A country group will be created for each OpenData region for the selected countries.
OpenData Subscriptions	Update	The subscriptions for the selected countries will be enabled and updated with default configurations.
Multi-Country Network Bridge	Add	A multi-country bridge will be created to connect to your Vault CRM org. By default, a Network Bridge for Vault CRM is a multi-country bridge.
Network Bridge	Add	A country-specific child bridge is created for each selected country.
Target Subscriptions	Add	A target subscription will be created for the Network Bridge to push data to Vault CRM.
Data visibility Profiles (DVPs)	Add	A DVP will be created for each selected country.

7. Click **Create Configurations**.
8. The confirmation dialog displays the system to use for the Network Bridge.

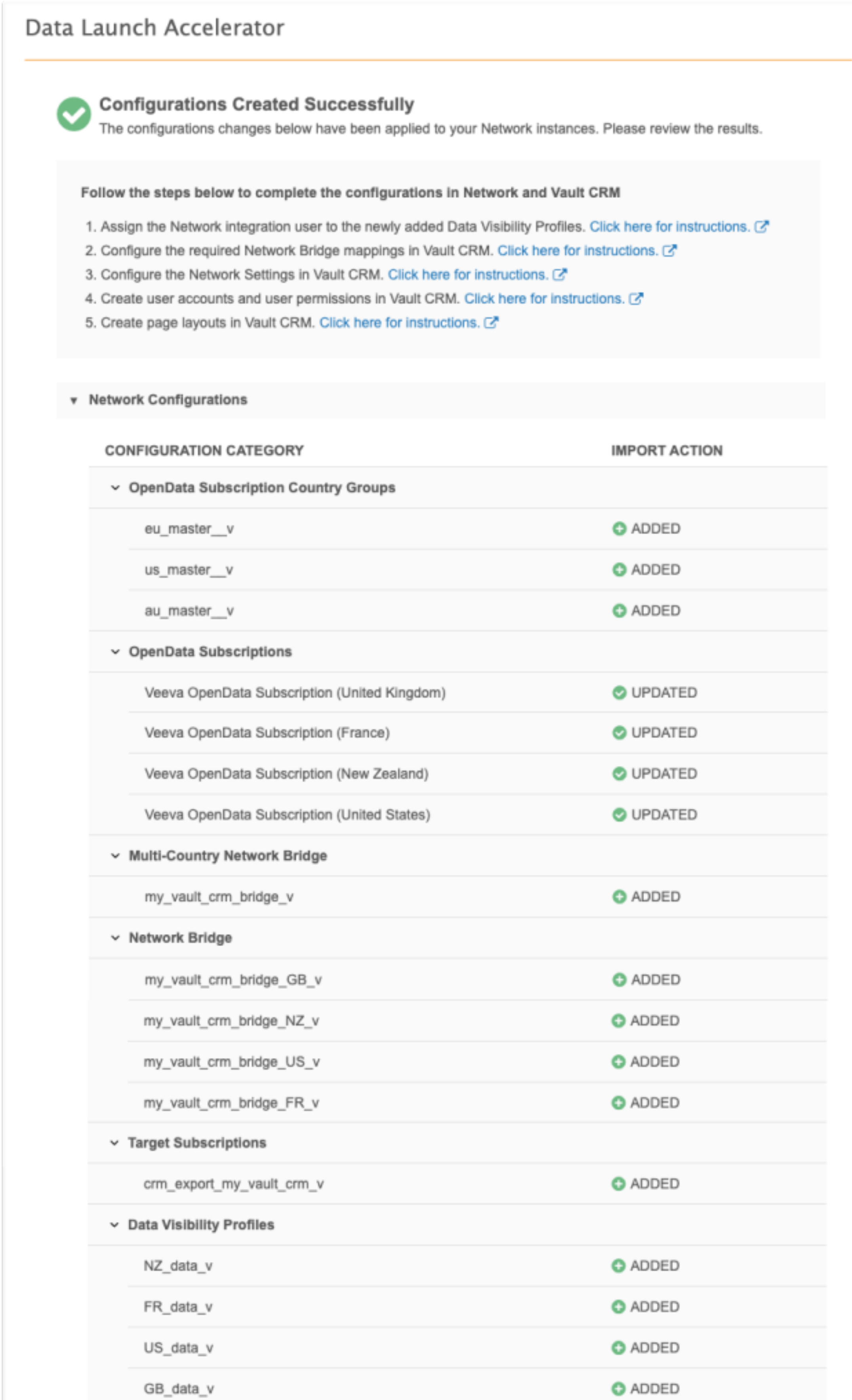


To confirm and proceed with the changes, click **Create Configurations**.

Tip: It can take a few minutes to generate the configurations. You can navigate away from the page during the process.

9. When the configurations are complete, the page refreshes to display all the actions taken for each configuration category.

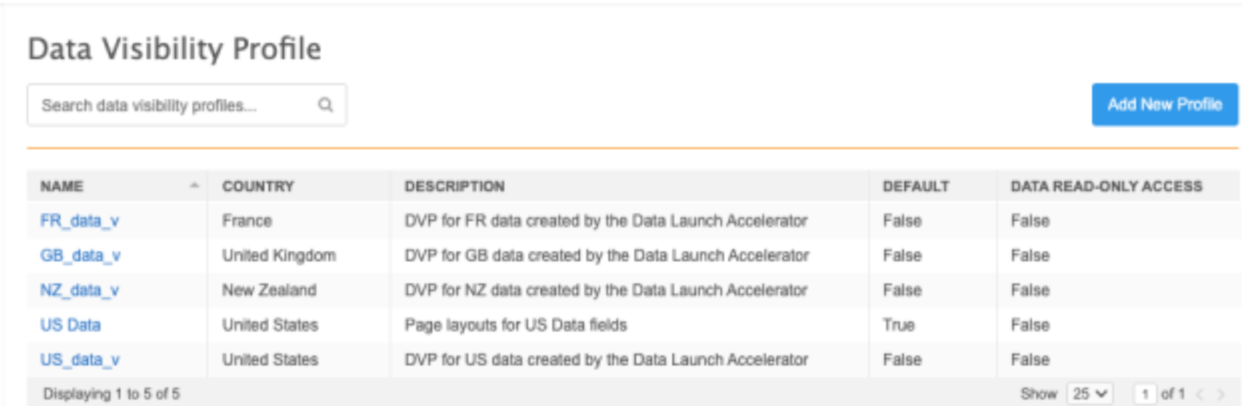
Additional steps to complete the process in Network and Vault CRM displays.


Data Launch Accelerator
Configurations Created Successfully
The configurations changes below have been applied to your Network instances. Please review the results.
Follow the steps below to complete the configurations in Network and Vault CRM
1. Assign the Network integration user to the newly added Data Visibility Profiles. Click here for instructions.
2. Configure the required Network Bridge mappings in Vault CRM. Click here for instructions.
3. Configure the Network Settings in Vault CRM. Click here for instructions.
4. Create user accounts and user permissions in Vault CRM. Click here for instructions.
5. Create page layouts in Vault CRM. Click here for instructions.
Network Configurations
CONFIGURATION CATEGORY
IMPORT ACTION
OpenData Subscription Country Groups
eu_master__v
ADDED
us_master__v
ADDED
au_master__v
ADDED
OpenData Subscriptions
Veeva OpenData Subscription (United Kingdom)
UPDATED
Veeva OpenData Subscription (France)
UPDATED
Veeva OpenData Subscription (New Zealand)
UPDATED
Veeva OpenData Subscription (United States)
UPDATED
Multi-Country Network Bridge
my_vault_crm_bridge_v
ADDED
Network Bridge
my_vault_crm_bridge_GB_v
ADDED
my_vault_crm_bridge_NZ_v
ADDED
my_vault_crm_bridge_US_v
ADDED
my_vault_crm_bridge_FR_v
ADDED
Target Subscriptions
crm_export_my_vault_crm_v
ADDED
Data Visibility Profiles
NZ_data_v
ADDED
FR_data_v
ADDED
US_data_v
ADDED
GB_data_v
ADDED

The configurations created by the wizard are now available in your Network instance.

Data visibility profile configurations

A DVP is created for each country selected in the Data Launch Accelerator.



NAME	COUNTRY	DESCRIPTION	DEFAULT	DATA READ-ONLY ACCESS
FR_data_v	France	DVP for FR data created by the Data Launch Accelerator	False	False
GB_data_v	United Kingdom	DVP for GB data created by the Data Launch Accelerator	False	False
NZ_data_v	New Zealand	DVP for NZ data created by the Data Launch Accelerator	False	False
US Data	United States	Page layouts for US Data fields	True	False
US_data_v	United States	DVP for US data created by the Data Launch Accelerator	False	False

Displaying 1 to 5 of 5 Show 25 1 of 1

Standard settings

When the DVP is created using the wizard, the following settings are defined. The settings can be changed after the DVP is created.

Setting	Value
Primary Information	
Profile Name	The naming convention is **<country_code>_data_v**. Example: **FR_data_v** (France).
Description	DVP for FR data created by the Data Launch Accelerator
Default (When Creating New User)	False
Permissions	
HCP Visibility	All
HCO Visibility	All
Data Read-only access	False
HCP Opt Out Visibility	False
Candidate Visibility	False
Can Download reports	True
Ad Hoc match	True
Ad Hoc Match Against OpenData	True
Hide Mail Only Addresses in Search API	False

Setting	Value
Profile Layout	
Health Care Professional Health Care Organization	Assigned to the default standard layout for that OpenData region. For example, France is assigned to the **EUStandard** layout.
Search	
Can search and query OpenData instance	True
Can download/sync records from OpenData instance	True
Can export from Search	True
Can Search Contract Organizations	False

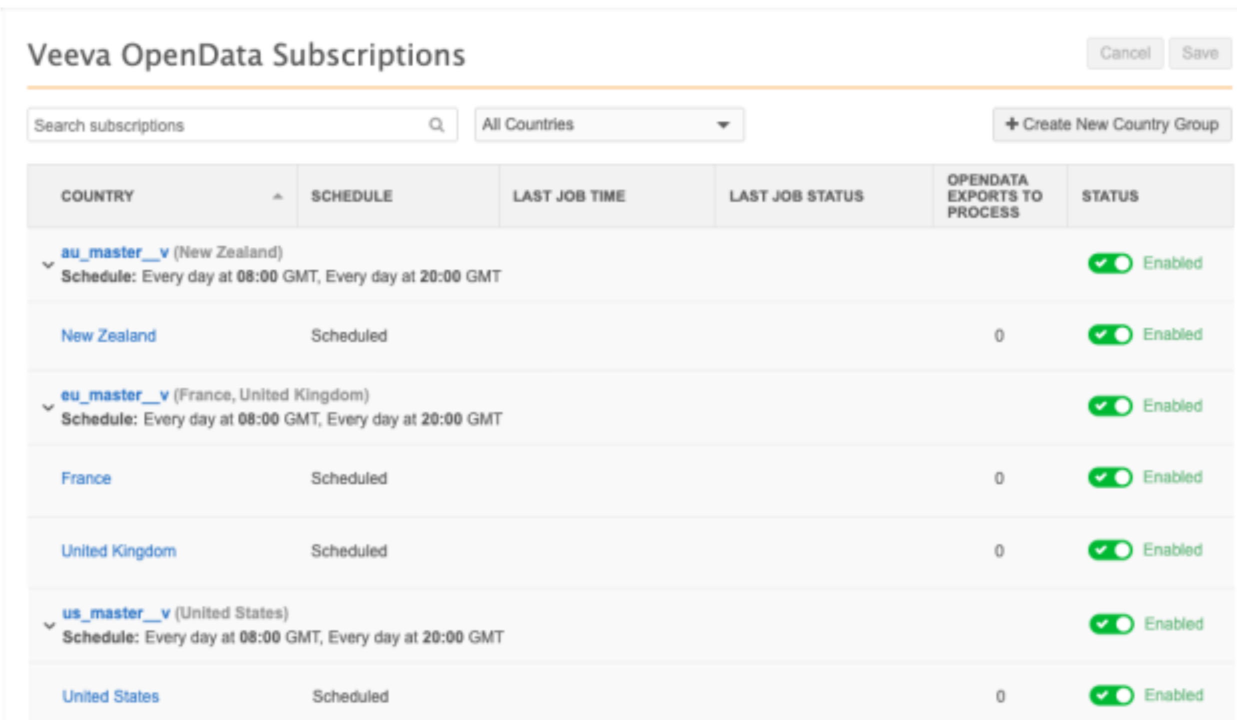
Next step

Assign the DVPs to the Network Integration user for the Vault CRM Bridge.

OpenData country groups

A country group is created for the OpenData region related to the selected countries.

Country groups help you to manage the schedule for multiple country configurations.



Standard settings

When the country group is created, the following settings are defined. These can be changed.

Setting	Value
Name	The naming convention is **<OpenData_region_instance>__v**. Example: The country group created for EMEA countries is **eu_master__v**.
Countries	All countries selected in the wizard for that region are added to the group.
Schedule	The subscription is scheduled to run daily at the following times: • 08:00 (GMT) • 20:00 (GMT) The schedule applies to all countries in the group. **Tip:** Open a country subscription to view the export times for that OpenData region and adjust the country group schedule to run soon after.

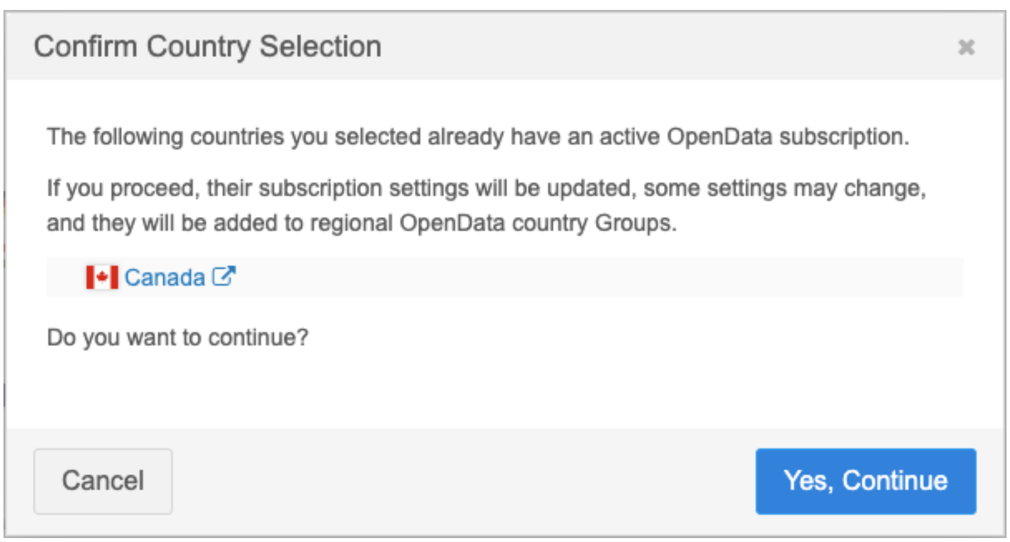
OpenData country subscriptions

For each country selected in the wizard, the following actions occur:

- **Enable** - Countries that are active, but not yet enabled, will be enabled.
- **Update** - All selected countries are configured with some standard settings.

  If an enabled country is selected, some settings in the current configuration might be changed.

  Confirm that the standard settings (see below) can be changed or click **Cancel** to go back and deselect the country before proceeding.



Standard settings

These settings are applied to the OpenData country subscriptions. They can be customized (overridden) after the wizard completes.

Setting	Value
Job Schedule & Triggers	
Job Schedule	None. The schedule is defined in the country group.
Job Triggers	When the country subscription job completes successfully, it will start the Network Bridge job for that country.
Parent HCO	
Level of parents to download	5
Download repointed Parent HCOs	True
Additional OpenData Parent HCO records	
Download Parent HCOs that are related to OpenData HCPs in my instance	True
Download Parent HCOs that are related to OpenData HCOs in my instance	True
Field Level Subscriptions	
Emails	True if the subscription setting is active in your Network instance. False if the subscription setting is not active.
All other subscriptions (HIN, Geo Subdivision, CIP, and so on)	False
Handling of OpenData Opt-Outs	
Convert OpenData opt-outs into customer-managed records	False

Target subscription

The wizard creates one target subscription that will be used by the Network Bridge.

Standard settings

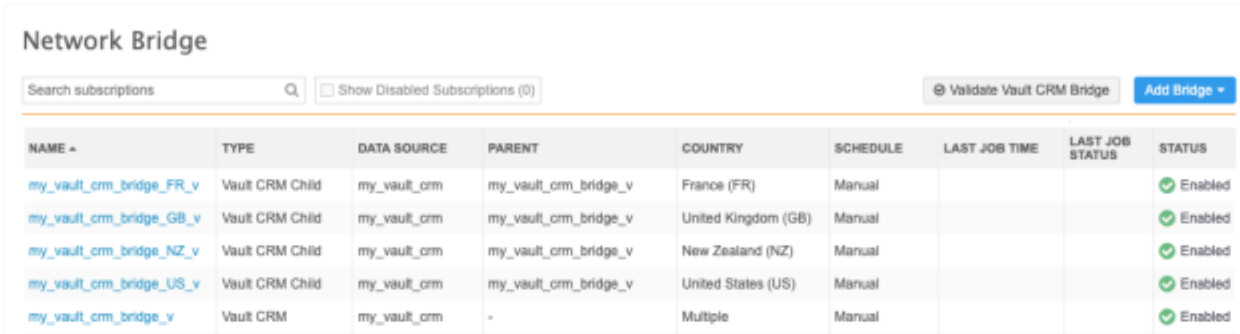
When the target subscription is created, the following settings are defined. These can be changed after the wizard completes.

Setting	Value
Details	
Name	The naming convention is **crm_export_<***Vault_CRM_system_name***>_v**. Example: If your Vault CRM system name is *my_vault_crm*, the target subscription name is **crm_export_my_vault_crm_v**.
Type	Data
General Export Options	
Full Data Extract	Delta
Record Type	Non-Candidate
Record State	All
Export only updated sub-objects	False
Reference data	False
File Format	
All settings	Uses default values
Export Locations	
Network FTP Path	Use default value
File & Field Selection	
Export Options	Select Which Objects and Fields to Export
Veeva standard objects (HCP, HCO, Address, License, Parent HCO, Custom Key)	Export All Fields
Export options	
Health Care Organization	All records
Health Care Professional	All records
Custom Key	Select Records A filter is defined to export records only for the Vault CRM source system are exported. **Filter Condition**: Source System IN <*Vault_CRM_system_name*>

Network Bridges

The Data Launch Accelerator creates the following Network Bridges:

- One Vault CRM Bridge (multi-country) for the Vault CRM org.
- A country-specific child bridge for each selected country.


Network Bridge

Search subscriptions | Show Disabled Subscriptions (0) | Validate Vault CRM Bridge | Add Bridge

NAME	TYPE	DATA SOURCE	PARENT	COUNTRY	SCHEDULE	LAST JOB TIME	LAST JOB STATUS	STATUS
my_vault_crm_bridge_FR_v	Vault CRM Child	my_vault_crm	my_vault_crm_bridge_v	France (FR)	Manual			Enabled
my_vault_crm_bridge_GB_v	Vault CRM Child	my_vault_crm	my_vault_crm_bridge_v	United Kingdom (GB)	Manual			Enabled
my_vault_crm_bridge_NZ_v	Vault CRM Child	my_vault_crm	my_vault_crm_bridge_v	New Zealand (NZ)	Manual			Enabled
my_vault_crm_bridge_US_v	Vault CRM Child	my_vault_crm	my_vault_crm_bridge_v	United States (US)	Manual			Enabled
my_vault_crm_bridge_v	Vault CRM	my_vault_crm	-	Multiple	Manual			Enabled

Standard settings

Setting	Value
Details	
Name	The naming convention is **<***Vault_CRM_system_name***>_bridge_v**. Example: If the system name is *my_vault_crm*, the multi-country bridge name is **my_vault_crm_bridge_v**.
Type	Vault CRM Data Subscription
Countries	
Country bridges	All country-specific child bridges created for the selected countries are connected.
Network Data	
System	The Vault CRM source system you defined in the Data Launch Accelerator.
Target Subscription	The target subscription created by the Data Launch Accelerator.
Connection Settings	
External credential	The Network Integration User you defined in the Data Launch Accelerator.
Advanced Settings	
Enhanced Inactivate Record Sync	True
Job Schedule & Triggers	
Job Schedule	None. (Bridges are triggered to run by the OpenData country subscriptions.)
Job Triggers	None

Using the wizard after the initial implementation

The wizard can be used to add countries or to create integration to a different Vault CRM org.

Adding countries to the existing Network Bridge

To add countries, complete the following on the wizard tabs:

1. **1- Select Vault CRM** - Choose the source system and credentials for the existing Vault CRM integration.
2. **2- Select Countries** - Choose the countries to add.
3. **3 - Preview Configurations**- Review the changes that will be made to your Network instance.

One of the following actions will be taken for each configuration.

Configuration	Action	Description
OpenData Subscription Country Groups	Add	A country group will be created if any selected countries are in a region that doesn't have an existing country group.
	Update	A country has been added to the existing country group.
	Skip	If the country was already enabled, no changes will be made because the country already belongs to the country group.
OpenData Subscriptions	Update	The subscriptions for the selected countries will be enabled and configured. If the country was already enabled, the configuration is updated with the standard settings.
Multi-Country Network Bridge	Update	A country-specific bridge has been added to the multi-country bridge configuration.
	Skip	If the country was already enabled, no changes will be made because the country-specific bridge was already added to the multi-country bridge by a previous run of the Data Launch Accelerator.
Network Bridge	Add	A country-specific bridge is created for each selected country.
	Skip	If the country was already enabled, no changes will be made because the country-specific bridge was already created by a previous run of the Data Launch Accelerator.
Target Subscription	Skip	No changes will be made to the target subscription because it was created by a previous run of the Data Launch Accelerator.
Data visibility Profiles (DVPs)	Add	A DVP will be created for each selected country.
	Skip	If the country has been enabled by the wizard previously, no changes will be made to the existing DVP.

Adding a new Vault CRM integration

Your Network instance can connect to multiple Vault CRM orgs.

Use the Data Launch Accelerate to generate the configurations for each Vault CRM org.

Complete the following on the wizard tabs:

1. **1- Select Vault CRM** - Choose the system and credentials for a different Vault CRM org.
2. **2- Select Countries** - Choose the countries to add for the Vault CRM integration.
3. **3 - Preview Configurations**- Review the changes that will be made to your Network instance.

One of the following actions will be taken for each configuration for subsequent Vault CRM integrations.

Configuration	Action	Description
OpenData Subscription Country Groups	Add	A country group will be created if any selected countries are in a region that doesn't have an existing country group in your Network instance.
	Update	A country has been added to the existing country group.
	Skip	No changes will be made because the country already belongs to the country group.
OpenData Subscriptions	Update	The subscriptions for the selected countries will be enabled and configured.
Multi-Country Network Bridge	Add	A multi-country bridge will be created to connect to your Vault CRM org.
Network Bridge	Add	A country-specific bridge is created for each selected country.
Target Subscriptions	Add	A target subscription will be created for the Network Bridge to push data to Vault CRM.
Data visibility Profiles (DVPs)	Add	A DVP will be created if the country has not been enabled by the wizard for any Network Bridge.
	Skip	If the country has been enabled by the wizard previously, no changes will be made to the existing DVP.

VAULT CRM BRIDGE RECORD LIMIT

Account records are upserted in batches when the Vault CRM Bridge runs. To optimize jobs, the number of account records upserted in each job has been increased.

	Previous Record Limit	New Record Limit
Default Record Limit	300,000	400,000
US Record Limit	150,000	200,000

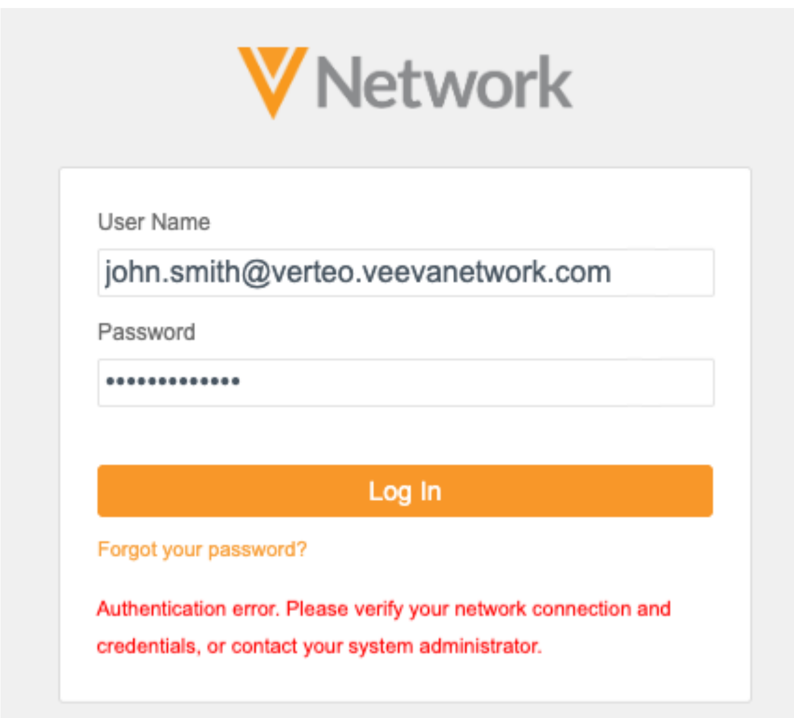
This enhancement is enabled by default in your Network instance.

Security

IP ACCESS CONTROL

To help block unauthorized access, Administrators can create rules that define the IP ranges that can access Network based on user security policies.

Users that log in outside of the defined IP range receive an error. After five unsuccessful login attempts, the user is locked out of Network.



This feature is available by default. Administrators must configure the rules.

Note: This is an optional feature. If IP Access Control rules are not created, there is no impact for users logging into your Network instance.

Supported users

IP Access Control rules are assigned to a security policy. Users assigned to the security policy must log into Network within the IP range.

IP Access Control does not apply to users that authenticate to Network using single sign-on (SSO).

Supported authentication methods

IP Access Control rules apply when users log into Network in the following ways:

- UI authentication (Network log in page)
- API authentication
- FTP access authentication

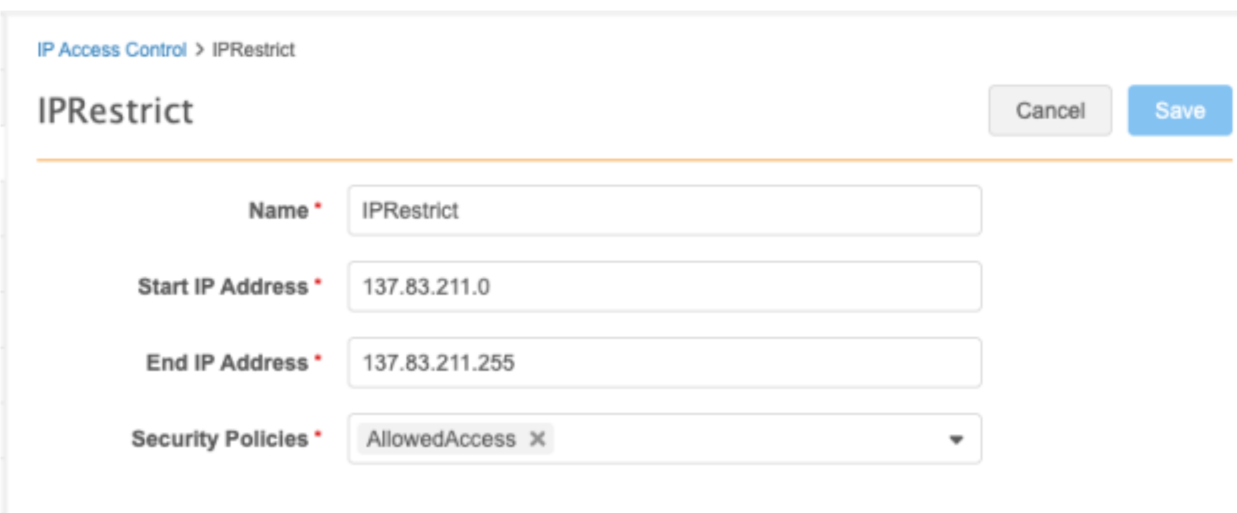
Prerequisites

- **Create a security policy** - IP access control rules are assigned to security policies. Create a policy to define the IP address ranges that are allowed to access your Network instance (**Settings > Security**).
- **Assign the security policy to users** - Assign the policy to users (**Users & Permissions > Users**).

Create an IP access control rule

Create a rules that allow or restricts access for specific IP address ranges.

Example rule



1. In the Admin console, click **Settings > IP Access Control**.
2. Click **Add Rule**.

   The New Rule page displays.

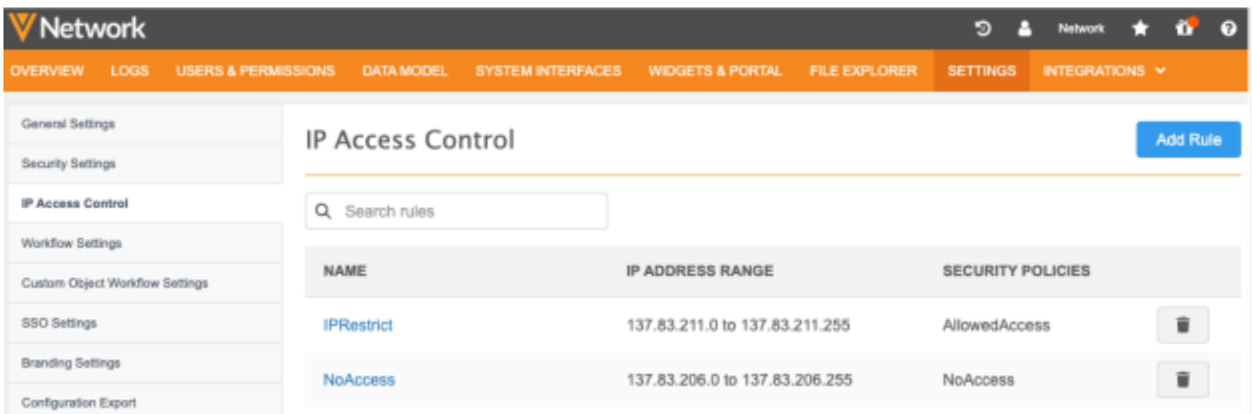
3. **Name** and **Description** - Type a meaning name and details about the rule.
4. **Start IP Address** - Type the start of the allowed IP address range.

   The IP addresses must be IPv4 address standard, for example: 137.43.211.1114.

5. **End IP Address** - Type the end IP address in the range.
6. **Security Policies** - Select the security policies to apply to the rule.

   Note: The rule is validated to ensure that the IPs are valid and that you are not creating a rule that locks you out of Network.

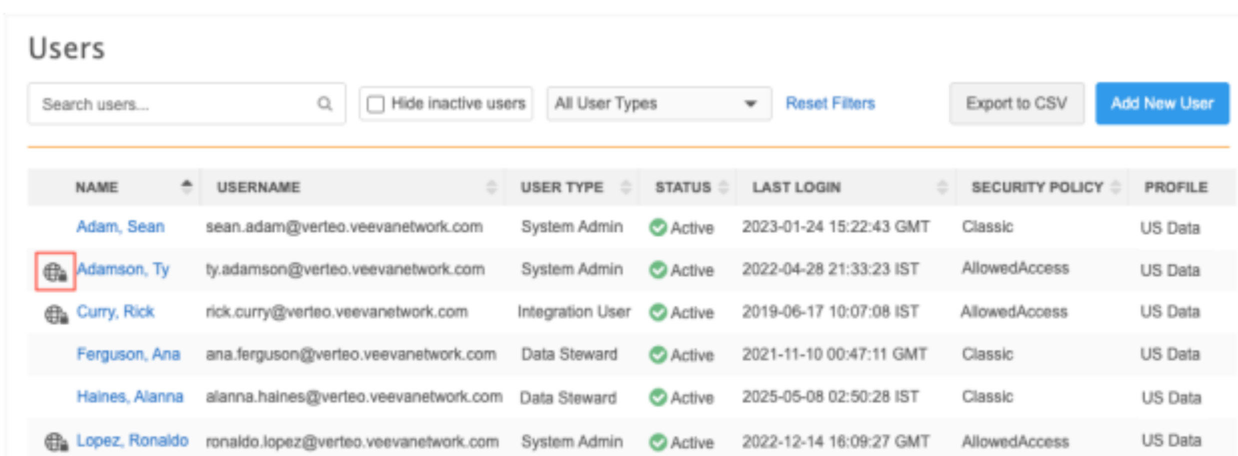
7. **Save** your changes.



User page updates

Administrators can quickly identify impacted users from the Users page (**Users & Permissions**).

An icon displays beside the name of any user where IP access control rule is applied to their assigned security policy.



Logs

Administrators can monitor the Network logs to take appropriate actions.

- **System Audit log**- Track changes to IP Access Control range settings.
- **Login Audit Log** - Review authentication failures due to IP access control.