Veeva Network 25R2.0.1 Release Notes

August 2025

Contents

## About these Release Notes

These Release Notes describe all features that will be included in Veeva Network 25R2.0.

### Release dates

- **Sandbox release** (version 25R2.0) - Friday, July 25
- **Production release** (version 25R2.0.1) - Friday, August 8

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#### *Software releases and maintenance*

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#### *Release Notes and Data Governance documents*

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- Veeva Connect - Join the Network Community.

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- 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.

## Release Note updates

The following Announcement has been added since the Sandbox Release Notes were published.

- **Add request match rules** – In version 25R3.0, updates will be made to the default match rules used by add requests for the LatAm countries.

The following changes have been made since the Early Release Notes were published.

### *Added*

The following enhancements have been added to this release:

- **Transformation rules** – Administrators and Data Managers now have the flexibility to apply a transformation rule to any target subscription, even if it's not associated with the rule's defined system.
- **Concurrent source subscriptions** - Source subscription jobs can now run at the same time to more efficiently support data updates for multiple data domains.
- **Vault CRM Bridge** – Bridge configurations will be validated automatically on a monthly schedule.

### *Removed*

The following enhancement has been removed from this release:

- **Match** - Data groups with name fields can now be configured to find similar names, improving matching flexibility.

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 25R2.0 major release.

| | | | ST | DS | DM | AD |
|---|---|---|---|---|---|---|
| **Announcements** | | | | | | |
| Add request match rules | The default match rules used by add requests will be updated for the LatAm countries. | 25R3.0 | | | ● | ● |
| **Hierarchy Explorer Widget** | | | | | | |
| Hide Export to Excel option | Administrators can hide the Export to Excel option to prevent users from exporting HCP and HCO accounts. | 25R2.0 | ● | ● | ● | ● |
| Open HCOs directly in Hierarchy Explorer from your web app | Web developers can use a new property to allow users to open HCOs in the widget directly from their external application. | 25R2.0 | | Developers | | |

| | | | ST | DS | DM | AD |
|---|---|---|---|---|---|---|
| **Profiles** | | | | | | |
| Additions to affiliation summary cards | Key Networks and Network hashtags now display on affiliation summary cards. | 25R2.0 | ● | ● | ● | ● |
| Updates to affiliation summary cards | The Hierarchy Type is removed from Parent and Child Affiliation summary cards. | 25R1.1 | ● | ● | ● | ● |
| **Network Explorer** | | | | | | |
| Filters | Custom keys now display in a table on record profiles so you can easily view and find specific keys. | 25R1.1 | ● | ● | ● | ● |
| **Reports** | | | | | | |
| Job Impact Dashboard | Use the new dashboard to view records that have been added or changed through jobs. | 25R2.0 | ● | ● | ● | ● |
| **Data change requests** | | | | | | |
| Multi-level DCR approval rules | Define rules to ensure that specific field changes are approved only by experienced Data Stewards. | 25R2.0 | ● | ● | ● | ● |
| **Data Model** | | | | | | |
| 4-byte characters | 4-byte characters are supported for data loading, data change requests, and Network search. | 25R1.1 | ● | ● | ● | ● |
| **Match** | | | | | | |
| Add Request Match Configuration | The default match rules are updated to reduce the potential for over matching for HCPs. | 25R1.1 | | | ● | ● |
| **Transformation rules** | | | | | | |
| Target subscriptions | Transformation rules can be applied to any target, even if it's not associated with the rule's defined system. | 25R2.0 | | | ● | ● |
| **Subscriptions** | | | | | | |
| Job error log folder | Administrators can customize the folder for job error logs for source subscriptions and data maintenance subscriptions. | 25R2.0 | | | ● | ● |

| | | | ST | DS | DM | AD |
|---|---|---|---|---|---|---|
| **Source subscriptions** | | | | | | |
| Concurrent jobs | Source subscription jobs can now run at the same time to more efficiently support data updates for multiple data domains. | 25R2.0 | | | ● | ● |
| **Configuration Management** | | | | | | |
| Deploy configurations to any target environment | Administrators can create export packages to download as a file and upload to any target Network instance. | 25R2.0 | | | | ● |
| **Workflow settings** | | | | | | |
| Auto-approve change requests for sub-objects | Sub-objects can now be auto-approved for change requests. | 25R2.0 | | | | ● |
| **Vault CRM integration** | | | | | | |
| Bridge validation schedule | Bridge configurations will be validated automatically on a monthly schedule. | 25R2.0 | | | ● | ● |
| MCSR Licenses | To support the updated Massachusetts guidance, the Network - CRM integration will add an HCP's MCSR license to their Massachusetts addresses that do not have a license. | 25R1.1.2 | | | ● | ● |
| 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. | 25R1.1 | | | ● | ● |
| Vault CRM Bridge record limit | The number of account records that can be upserted in each job has been increased. | 25R1.1 | | | ● | ● |
| **Security** | | | | | | |
| IP Access Control | For added security, Administrators can define the allowed IP range for access to Network. | 25R1.1 | | | | ● |
| **API** | | | | | | |
| Version update | The Network API is updated to v36.0. | 25R2.0 | | Developers | | |

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

# Announcements

## ADD REQUEST MATCH RULES

25R3

In version 25R3.0, updates will be made to the default match rules used by add requests. The rules will be modified to reduce the potential for over matching for HCPs and HCOs.

Changes will be made for countries in the Latin America region.

### *Custom match rules*

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

## Hierarchy Explorer widget

Hierarchy Explorer is a Network widget that you can use to see all levels of an HCO's structure, making it easy to visualize their hierarchy and find new targets.

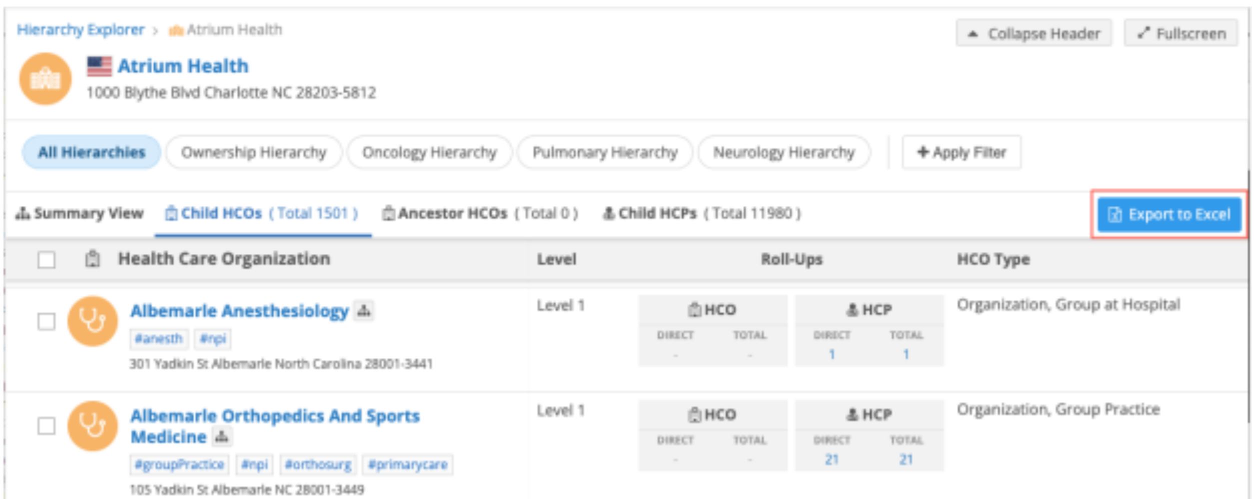
To enable Hierarchy Explorer in your Network instance, contact Veeva Support.

The following enhancements have been added for the Hierarchy Explorer widget in this release.

### Hide Export option

25R2

For compliance, it might be necessary to prevent users from exporting HCP and HCO details from the widget. To support this requirement, the **Export to Excel** button can be removed from the **Child HCPs** and **Child HCOs** tabs.




This enhancement is available by default. It can be enabled through the Network Portal or through a property in the widget code for external applications.

#### *Widget property*

Web developers can add the following property to the widget code to hide the **Export to Excel** button.

```
hide-export-button="true"
```

By default, the property is false.

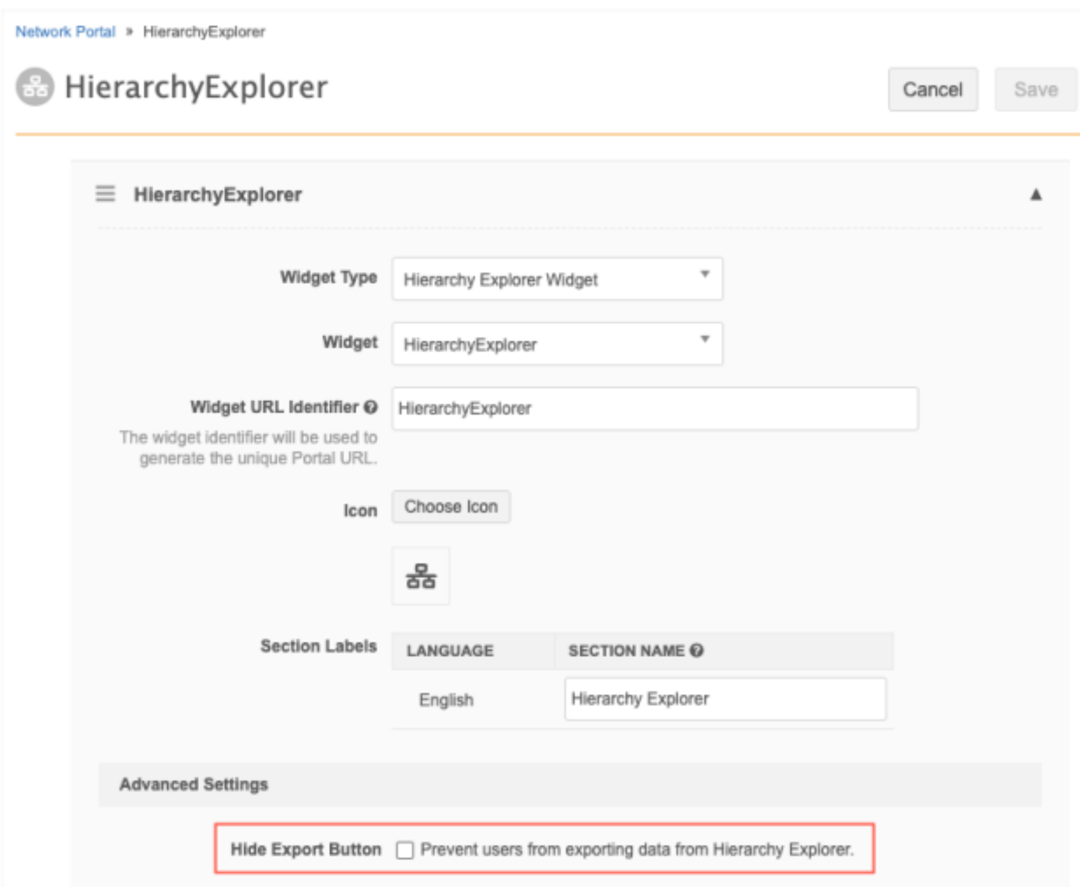
```
<veeva-network-hierarchy-explorer-widget
    widget-name="MyHierarchyExplorer"
    auth-domain="verteo.veevanetwork.com"
    widget-id="MzAxPzs7cGhdgb1hY3luZXR3b3Jrc19fYw=="
    hide-export-button="true">
</veeva-network-hierarchy-explorer-widget>
```

When the property is added, the **Export to Excel** button will not display on the Child HCP and Child HCO views in the widget.

### *Network Portal*

Administrators can enable the behavior in the HEW configuration for the Network Portal.

1. In the Admin console, click **Widgets & Portal > Network Portal**.
2. Select a Hierarchy Explorer configuration.
3. In the Widget Configuration section, select the **Hide Export Button** setting.




When the **Export to Excel** option is hidden, the checkboxes beside the accounts are removed from the **Child HCOs** and **Child HCPs** tabs.

## Open HCO using IDs

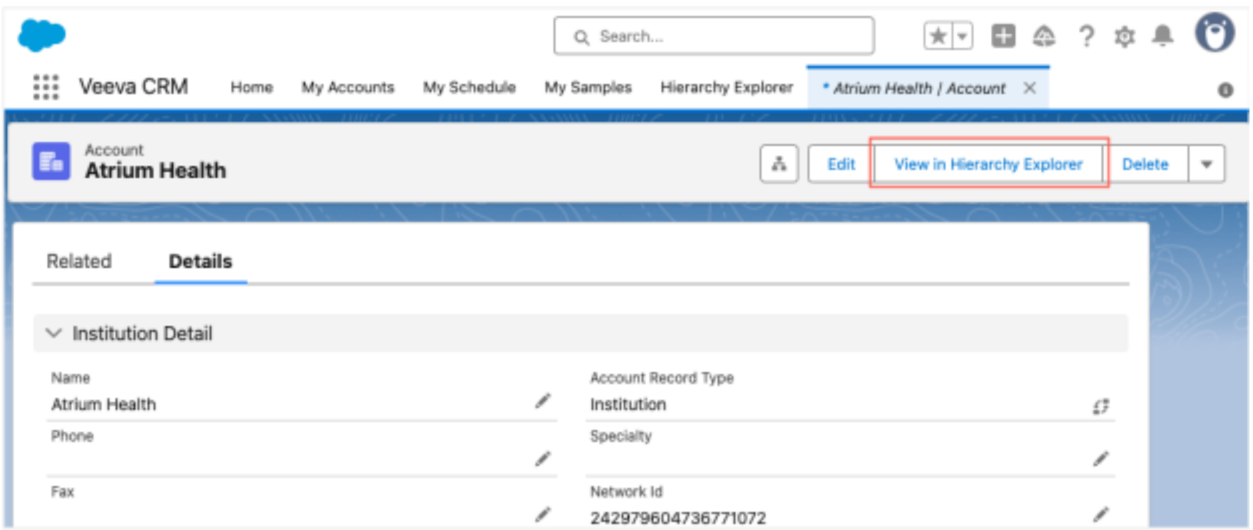
25R2

Widget developers can configure a button in their web application to open an HCO account directly in Hierarchy Explorer. Previously, the widget homepage could be opened and then users could search for the HCO.

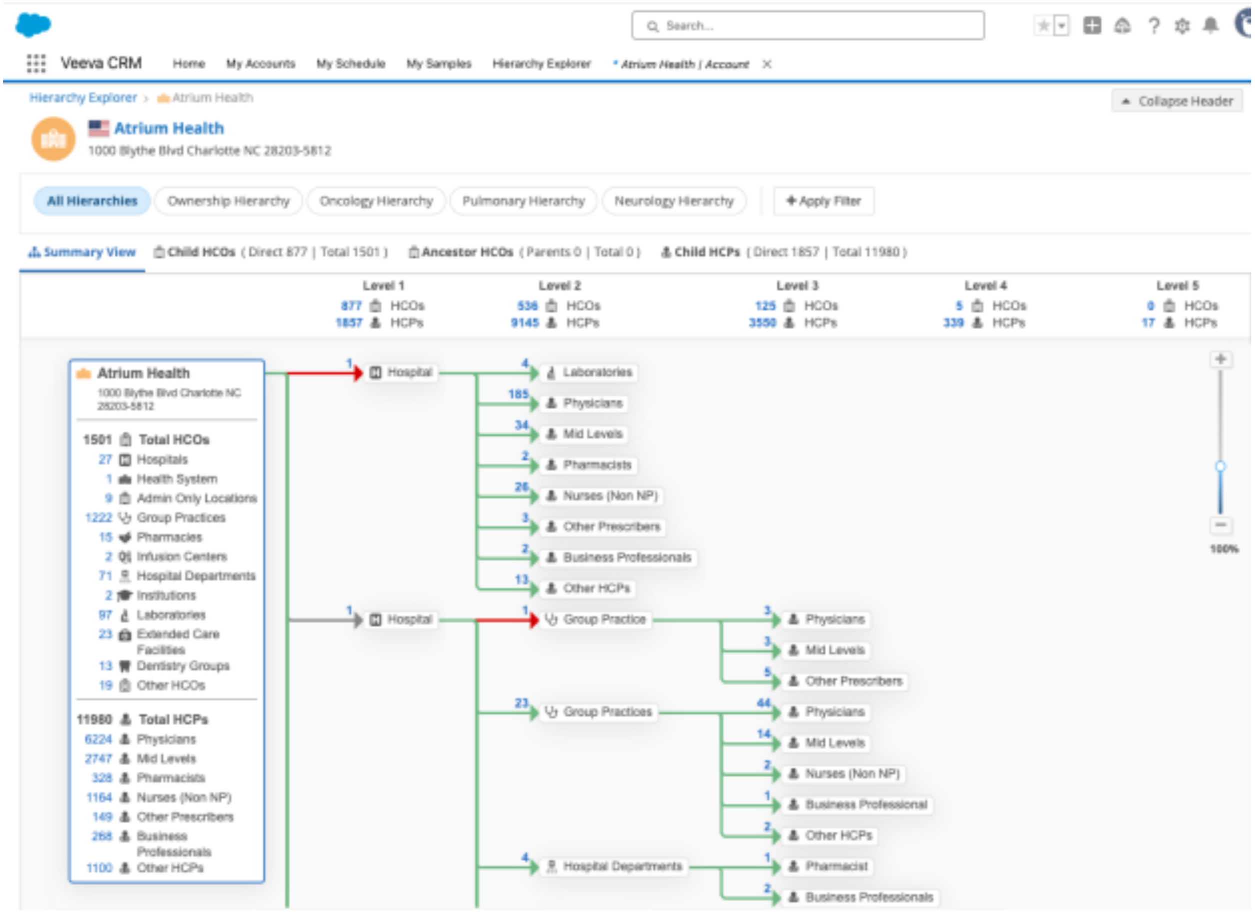
This enhancement is supported for widgets embedded in external applications only. It is not supported for the Network Portal.

### *Example*

Create a button in your external application that displays on HCO accounts.




When users click the button, the Hierarchy Explorer widget opens directly to the HCO and bypasses the homepage.




## *Enable this enhancement*

Widget developers can add the following property to the Hierarchy Explorer widget code:

```
identifier=<VID/CustomKey/Alternate Key>
```

```
<veeva-network-hierarchy-explorer-widget
    widget-name="MyHierarchyExplorer"
    auth-domain="verteo.veevanetwork.com"
    widget-id="MzAxPzs7cGhdgb1hY3luZXR3b3Jrc19fYw=="
    identifier="242934774091468456">
</veeva-network-hierarchy-explorer-widget>
```

### *Supported accounts*

- HCOs

### *Supported identifiers*

- VIDs
- alternate keys
- custom keys

### *Supported records*

- Active
- Valid
- Under Review

### Considerations

- **Merged records** - If a merge loser identifier is used, the merge winner will open in Hierarchy Explorer.

- **Deleted or invalid records** - The Hierarchy Explorer homepage displays the following message:

```
Unable to open the requested account <identifier>. Use the search to
find the account you are looking for.
```

### *Configuring external applications*

Web developers determine how to access the widget from their external application.

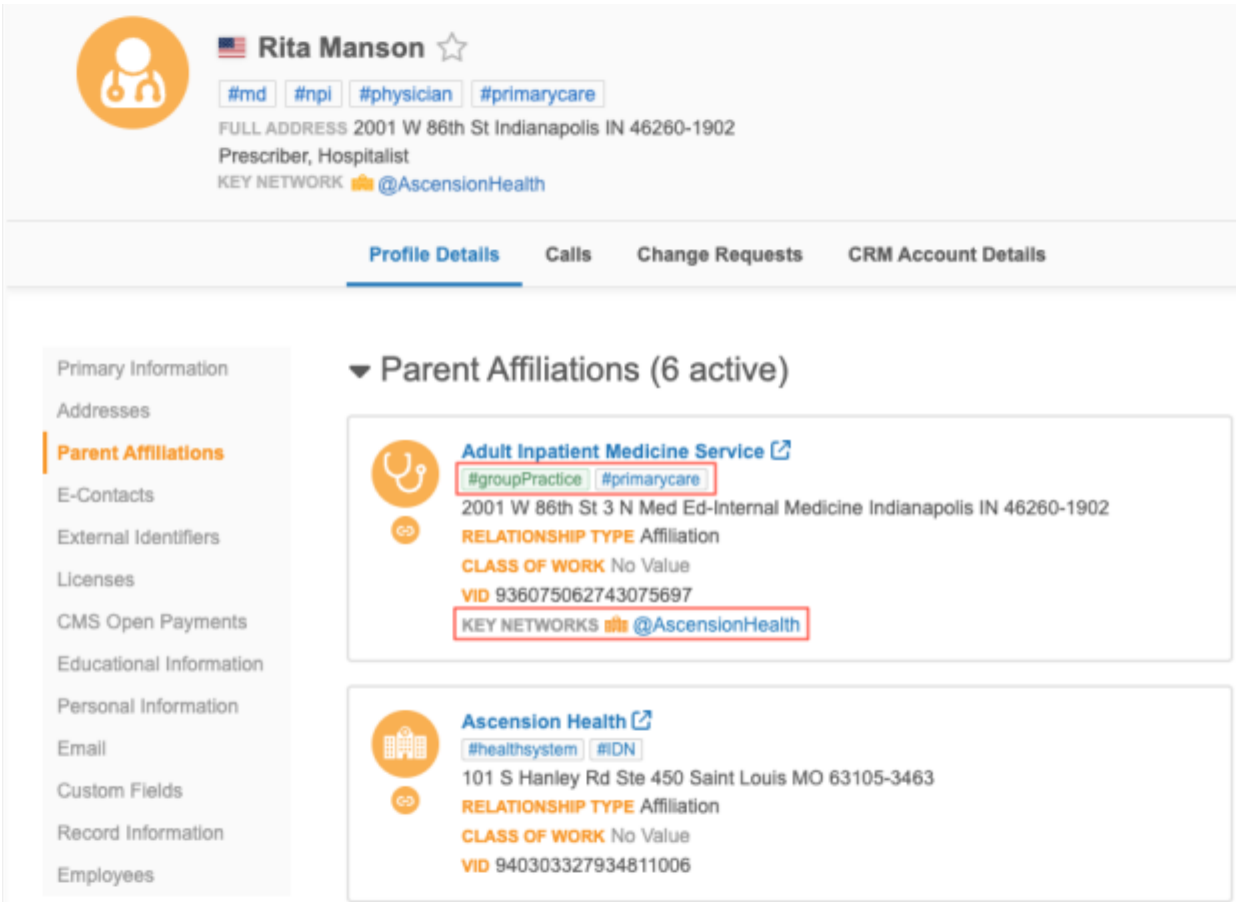
For an example, see the Profile widget documentation in the *Veeva Network Developer Help*.

## Profiles

### AFFILIATION UPDATES

25R2

Key Networks and Network hashtags now display on affiliations. Use these details to easily identify key information about the records and why they might be important.




This enhancement is enabled by default in your Network instance.

#### *Key Networks*

The updates are included for the following:

- Parent Affiliation summary cards
- Child Affiliations (HCO) summary cards
- Additional OpenData HCOs

### *Network hashtags*

The updates are included on the following:

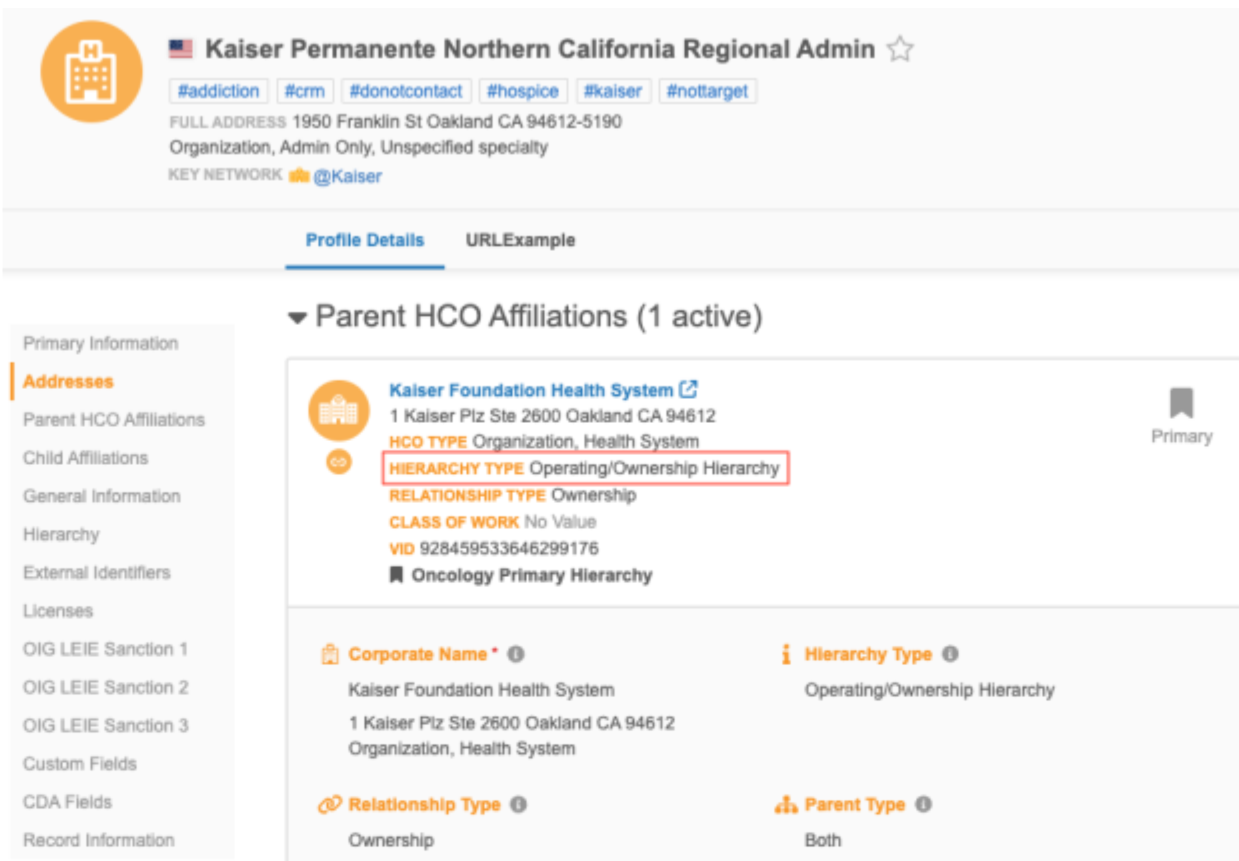
- Parent Affiliations
- Child Affiliations (HCO)
- Additional OpenData HCOs
- Custom Parent Relationship records
- Custom Child Relationship records

#### AFFILIATION SUMMARY CARDS

25R1.1

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.



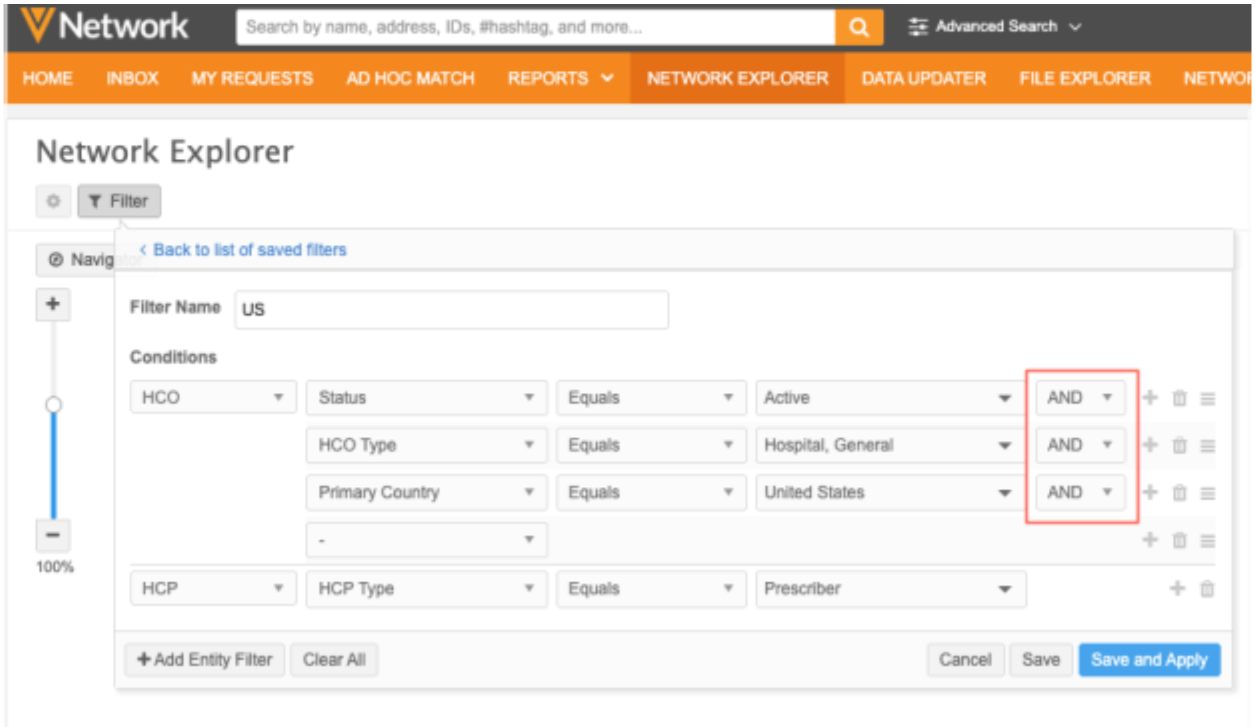

This change is enabled by default in your Network instance. The **Hierarchy Type** is removed for all records regardless of the profile layout that is used.

# Network Explorer

## CHANGES TO FILTERS

25R1.1

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.

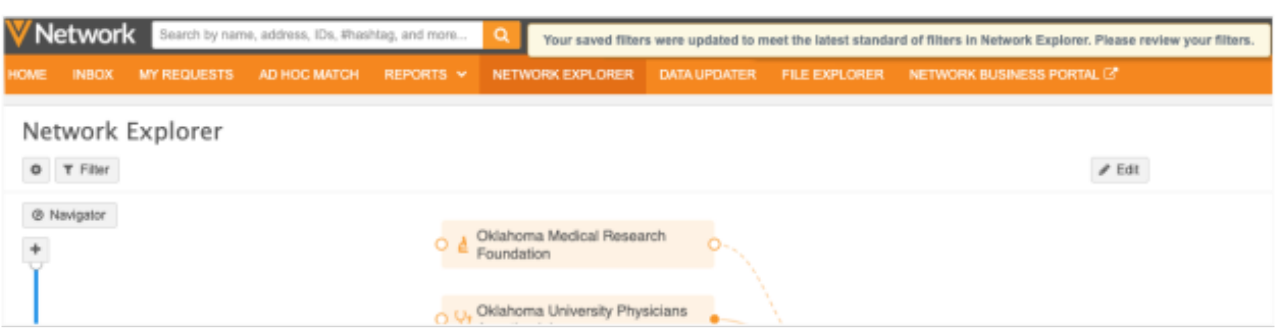



This change is enabled by default in your Network instance.

### *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.



## Reports

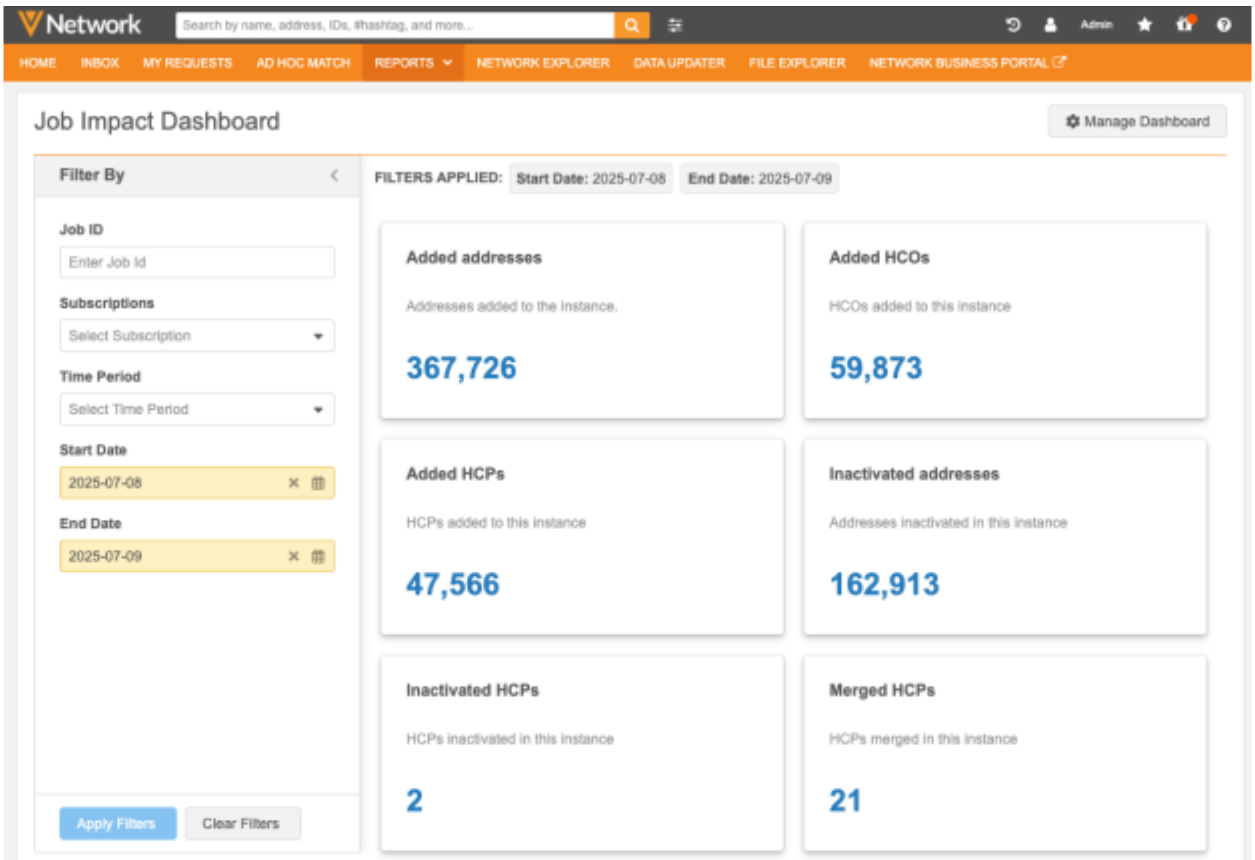
### Job Impact Dashboard

25R2

A new dashboard can help you understand how jobs that add or change records have impacted your Network instance.

Each tile on the dashboard displays counts of the changes made by the jobs that you want to view. For example, you can view the changes made by a specific job or changes made by all jobs over the past day.

Network provides several predefined tiles and you can create custom tiles to query specific revision data.




This feature is enabled by default in your Network instance.

### *About the dashboard*

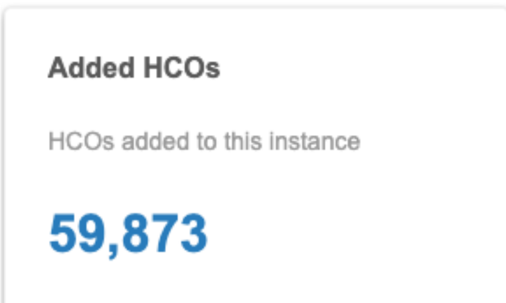
All users with reporting access see the same Job Impact Dashboard. Any changes made to the dashboard apply to all users.

Each dashboard tile is a query that uses revision history reporting tables to provide a record count of the changes.

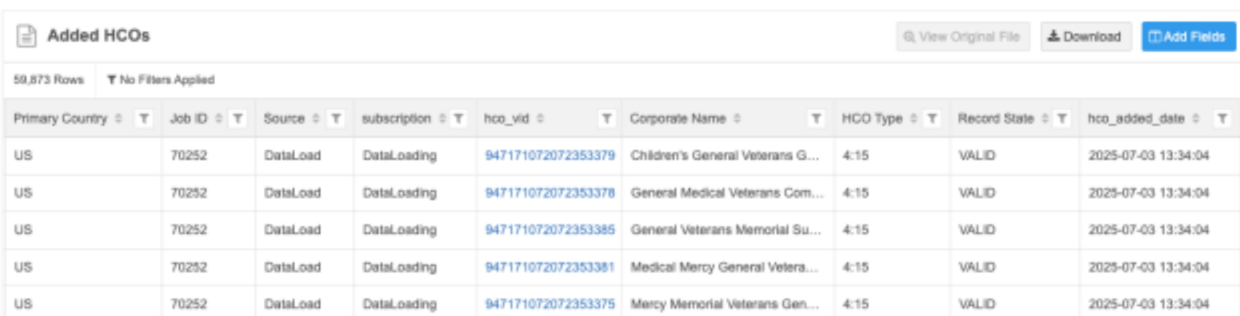
By default, six tiles display on the dashboard. To display additional tiles, click **Manage Dashboard** and enable them on the Job Impact Dashboard Settings page. A maximum of 21 tiles can be enabled.

#### Tile Details

- Report (query) name
- Description of query
- Count of data changes




Click the count to open a Network table containing the record details.


Added HCOs
View Original File
Download
Add Fields
59,873 Rows
No Filters Applied

| Primary Country | Job ID | Source | subscription | hco_vid | Corporate Name | HCO Type | Record State | hco_added_date |
|---|---|---|---|---|---|---|---|---|
| US | 70252 | DataLoad | DataLoading | 947171072072353379 | Children's General Veterans G... | 4:15 | VALID | 2025-07-03 13:34:04 |
| US | 70252 | DataLoad | DataLoading | 947171072072353378 | General Medical Veterans Com... | 4:15 | VALID | 2025-07-03 13:34:04 |
| US | 70252 | DataLoad | DataLoading | 947171072072353385 | General Veterans Memorial Su... | 4:15 | VALID | 2025-07-03 13:34:04 |
| US | 70252 | DataLoad | DataLoading | 947171072072353381 | Medical Mercy General Vetera... | 4:15 | VALID | 2025-07-03 13:34:04 |
| US | 70252 | DataLoad | DataLoading | 947171072072353375 | Mercy Memorial Veterans Gen... | 4:15 | VALID | 2025-07-03 13:34:04 |

All Network table actions are available. For details see the Network tables topic in the *Veeva Network Online Help*.

Each VID is a link that opens the record profile in a new browser tab.

### *Supported objects*

The dashboard can show changes for any enabled object in your Network instance by leveraging the related revision table.

- Veeva standard objects (HCP, HCO, Address, License, Parent HCO, Custom Keys)
- custom objects

### *Supported users*

The Job Impact Dashboard uses Network's reporting feature to query the data and provide record counts. The dashboard is available for any user that has access to the **Reports** feature in the Network UI.

The ability to explore the results and manage the dashboard tiles depends on the permissions assigned to each user account.

#### Dashboard access

Administrators must configure the following settings for users to access the Job Impact Dashboard.

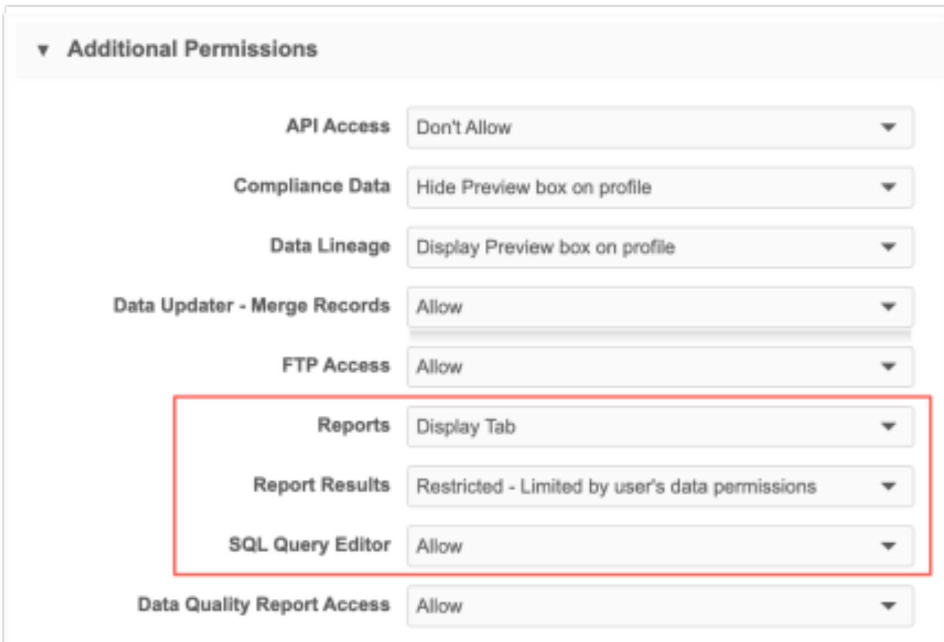
| Level | Access | User Type | Configuration |
|---|---|---|---|
| Network instance | Display **Reports** feature on the Network menu bar | Not applicable | Enable the **Reporting View** setting in **Settings > General Settings** so the Reports menu displays in your Network instance. |
| User level | View dashboard and work with SQL queries | Data Steward<br>Standard User<br>System and Data Admin | In the **Additional Permissions** section on each user account, set the following options:<br>• **Reports** - Set to **Display Tab**.<br>• **SQL Query Editor** - Set to **Allow**. |
| | View dashboard and work with SQL queries | Data Manager<br>System Admin | In the **Additional Permissions** section on each user account, set the following options:<br>• **Reports** - Set to **Display Tab**.<br><br>**Note**: These user types have access to the SQL Query Editor by default once the **Reports** option is set to **Display Tab** |
| | View dashboard results | Data Manager<br>Data Steward<br>Standard User<br>System Admin<br>System and Data Admin | The **Report Results** setting determines the data the users can access in the dashboard results.<br><br>**Restricted - Limited by user's data permissions**<br>The user's data visibility profile (DVP) is applied. The record counts on the dashboard tiles and the Network table displays only the records that the user has access to through their DVP.<br><br>**Unrestricted - Access to all data**<br>The dashboard queries will ignore the user's DVP and display all available results. |

## Example user permissions

**Data Stewards, Standard users, System and Data Admins**

Administrators must set the following permissions for these user accounts:

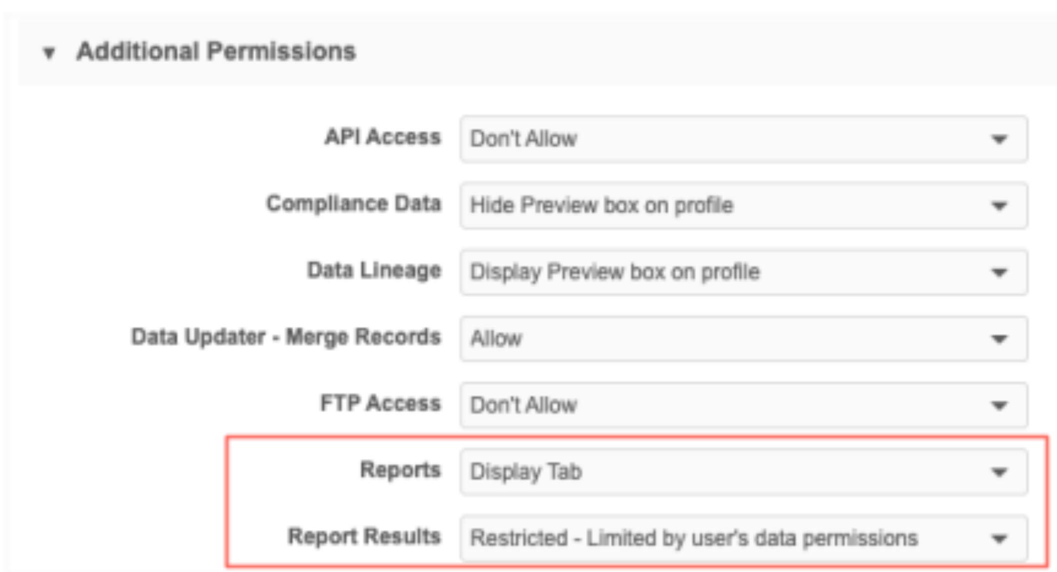
- **Reports** - Set to **Display tab**.
- **SQL Query Editor** - Set to **Allow**.




**Data Stewards, Standard users, System and Data Admins**

Administrators must set the following permissions for these user accounts:

- **Reports** - Set to **Display tab**.



### *Access the dashboard*

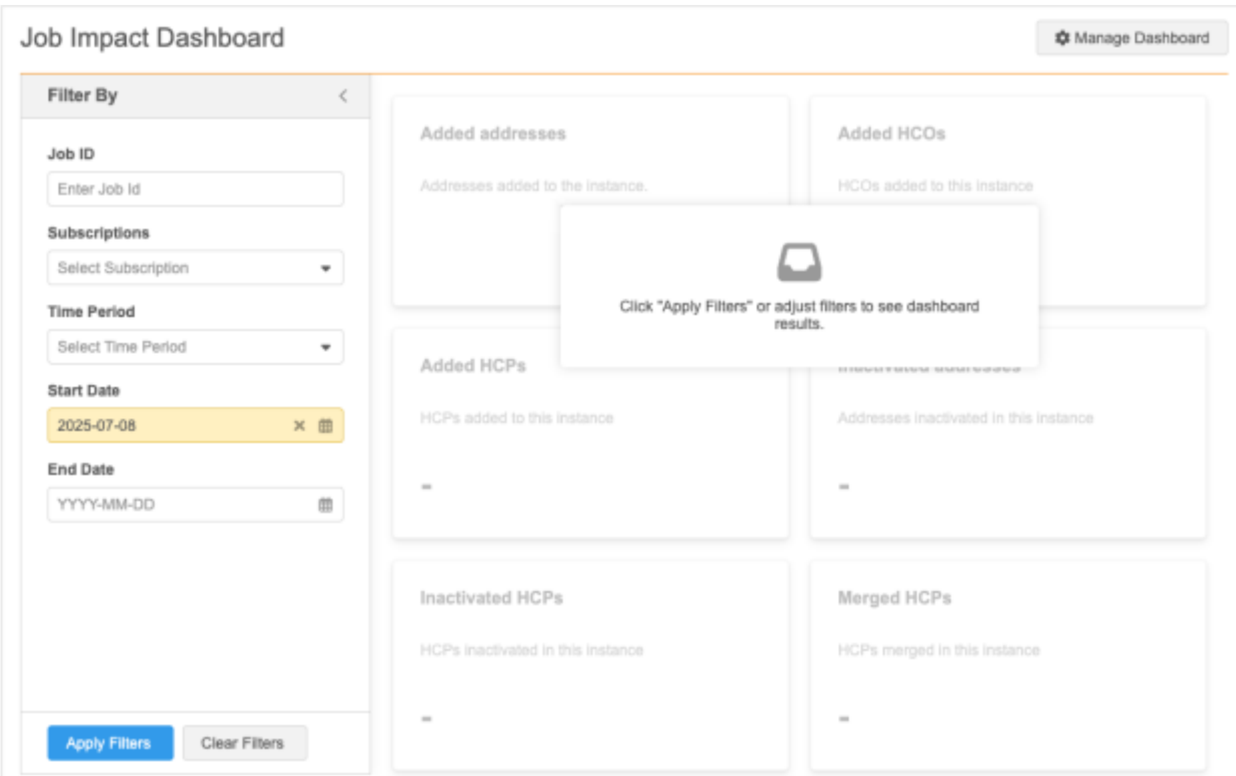
The Job Impact Dashboard can be accessed from the **Reports** menu or from any source system or subscription that adds or changes data in your Network instance.

#### Network menu bar

- Click **Reports > Job Impact Dashboard**.

When you open the dashboard, no filters are applied. Use the **Filter By** panel to choose the job data that you want to view.

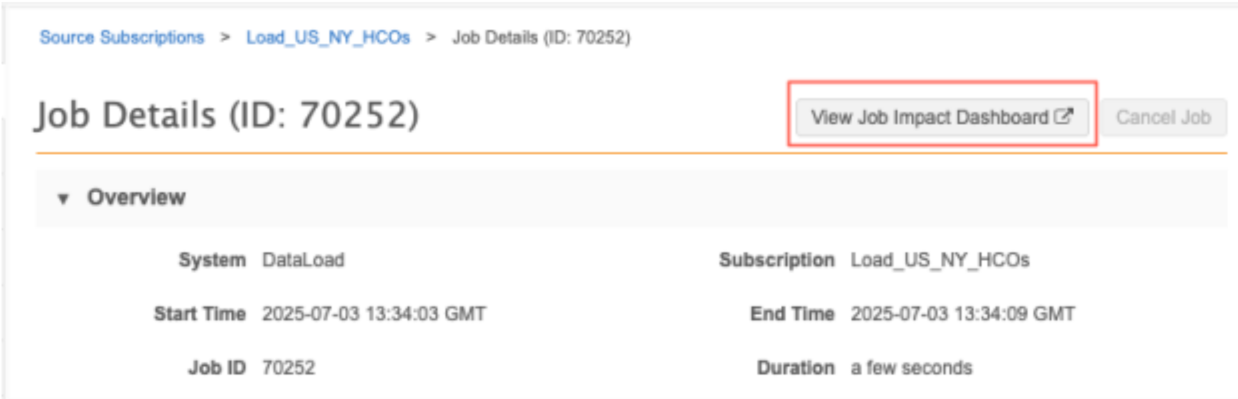
By default, the **Start Date** filter is set to yesterday's date.




#### Access the dashboard from a system or subscription

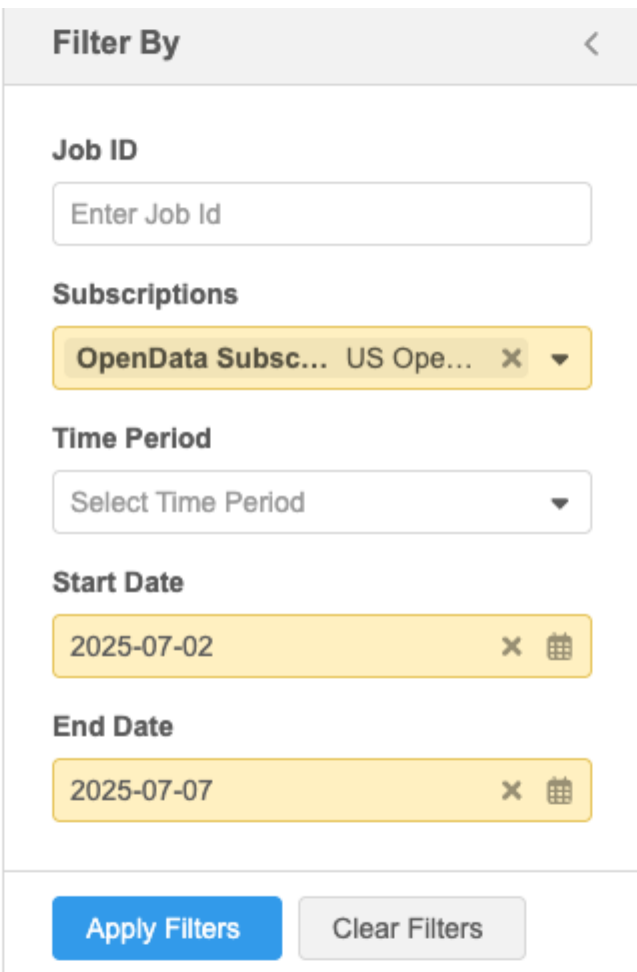
Systems and subscriptions contain a **View Job Impact Dashboard** button in the **Job History** section or on Job Details page. When you navigate to the dashboard from a specific subscription or job, the dashboard is automatically filtered to show you the relevant details.

**Example**




### *Filter the dashboard*

Use the **Filter By** panel to choose the job data that you want to view.



### Filter options

- **Job ID** - Type a specific job ID.

  Job ID filters ignore all other defined filters because it's for a specific job.

- **Subscriptions** - Displays all subscriptions that add or change data in your Network instance.
- **Time Period** - Specify a duration.
  - Last day
  - Last 7 days
  - Last month
  - Last 3 months
- **Start Date** - Specify the first day to query data changes.

  If a **Time Period** or **Start Date** is not defined, the default value is yesterday.

- **End Date** - Specify the last day to query the data.

  If you select a **Time Period**, the **Start Date** and **End Date** are automatically filled.

> **Important**: The dashboard can return results for a maximum three month period. If the **Start Date** and **End Date** duration is longer than three months an error displays.

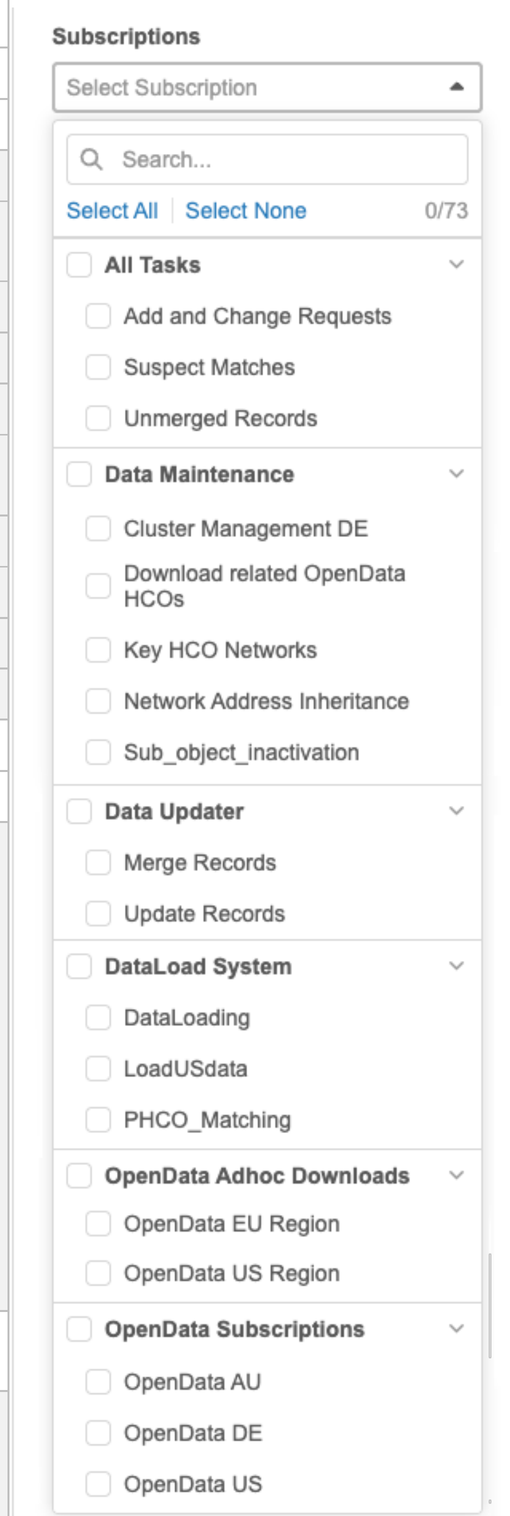
### Filter by subscription

The **Subscriptions** filter contains all subscriptions that add or change data in your Network instance.

Choosing a job type (for example, **OpenData Subscriptions**) will return results for all subscriptions listed in that section. Alternatively, you can choose one or a few subscriptions under one or multiple job types.

**Supported subscriptions**

Subscription jobs are organized into categories and listed alphabetically.

| Job Type | Subscription | Example Expanded Filter |
|---|---|---|
| Tasks | Add and Change Requests |  |
| | Suspect Matches | |
| | Unmerged Records | |
| Data Maintenance<br><br>Includes Data Maintenance subscription jobs and other related jobs. | Anonymize Deleted HCP Records | |
| | Cluster Management (listed by country using the 2-letter country code) | |
| | Data Deduplication | |
| | Delete Custom Object Records | |
| | Delete Locally Managed Records | |
| | Download related OpenData HCOs (OpenData subscription setting) | |
| | Key HCO Networks | |
| | Network Address Inheritance | |
| | Sub-object Inactivation | |
| | Unsubscribe from OpenData Records | |
| Data Updater | Merge Records | |
| | Update Records | |
| OpenData Ad Hoc Downloads | One-time download or update using the following ad hoc jobs:<br>• Ad Hoc Download (OpenData country subscription)<br>• Download from OpenData (search results, record profiles)<br>• Sync with OpenData (search results, data lineage)<br>For details about ad hoc jobs, see Downloading records from Veeva OpenData in the *Veeva Network Online Help*.<br>Jobs are organized by OpenData regions (example, OpenData EU Region)<br>For details, see OpenData countries in the *Veeva Network Online Help*. | |
| OpenData Subscriptions | Enabled individual country subscriptions are listed using the 2-letter country code. | |
| Source Subscriptions | Categorized system name.<br>Each subscription associated to the system is listed alphabetically. | |

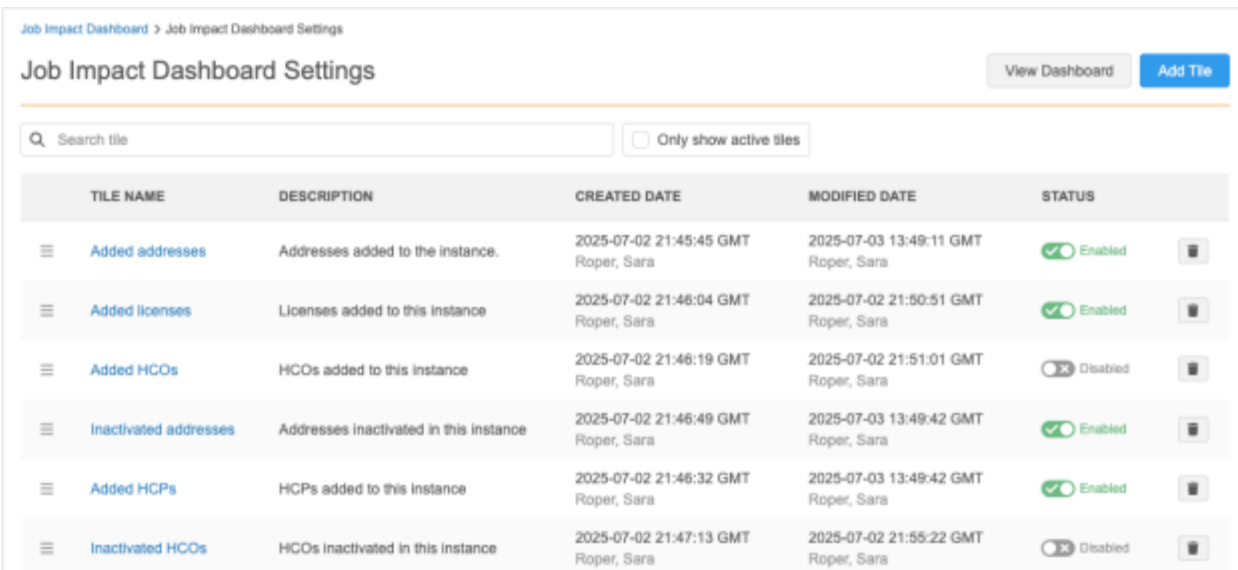
**Data maintenance**

In the **Data maintenance** filter category, the following data maintenance jobs are listed by their user-defined subscription name in ascending alphabetical order:

- Anonymize Deleted HCP Records
- Data Deduplication
- Delete Custom Object Records
- Delete Locally Managed Records
- Hard Delete Custom Object Records
- Sub-Object Inactivation
- Unsubscribe from OpenData Records

### *Manage your dashboard*

Click **Manage Dashboard** to manage the available tiles and to create new tiles.




#### Available actions

- **Search** - Find a tile by keyword in the **Name** or **Description**.
- **Enable** - Display a tile on the dashboard.
- **Disable** - Remove a tile from the dashboard.
- **Re-Order** - Use the **Handle**☰ icon to move a tile to a different position on the dashboard.
- **View tiles** – By default, all tiles display. To view enabled tiles only, select **Only show active tiles.**
- **Delete** - Remove a tile from your Network instance. (*Admin and System and Data Admin users only*)
- **Edit tiles** - Update the existing tiles. Click the name of the tile to open the details page.
- **Create tiles** - Click **Add Tile** to define a custom query.

### *Available tiles*

Network provides the set of predefined tiles (queries).

| Tile Name | Description |
| --- | --- |
| Added addresses | Addresses added to this instance. |
| Added custom keys | Custom keys added to this instance. |
| Added licenses | Licenses added to this instance. |
| Added HCOs | HCOs added to this instance. |
| Added HCPs | HCPs added to this instance. |
| Added Parent HCOs | Parent HCOs added to this instance. |
| Inactivated addresses | Addresses that have been inactivated.<br>Results include addresses with any record state that have their address_status__v field changed to "I". |
| Inactivated custom keys | Custom keys that have been inactivated.<br>Results include custom keys that have their custom_key_status__v field changed to "I". |
| Inactivated HCOs | HCOs that have been inactivated.<br>Results include HCOs with any record state that have their hco_status__v field changed to "I". |
| Inactivated HCPs | HCPs that have been inactivated.<br>Results include HCPs with any record state that have their hcp_status__v field changed to "I". |
| Inactivated licenses | Licenses that have been inactivated.<br>Results include licenses with any record state that have their license_status__v field changed to "I". |
| Inactivated Parent HCOs | Parent HCOs that have been inactivated.<br>This query returns Parent HCOs with any record state that have their parent_hco_status__v changed to "I". |
| Invalidated addresses | Addresses that have been invalidated.<br>Results include addresses with any record state that have their record_state__v changed to "INVALID". |
| Invalidated custom keys | Custom keys that have been invalidated.<br>Results include custom keys with any record state that have their record_state__v changed to "SD" (Source Deactivated). |
| Invalidated licenses | Licenses that have been invalidated.<br>Results include licenses with any record state that have their record_state__v changed to "INVALID". |
| Invalidated HCOs | HCOs that have been invalidated.<br>Results include HCOs with any record state that have their record_state__v changed to "INVALID". |
| Invalidated HCPs | HCPs that have been invalidated.<br>Results include HCPs with any record state that have their record_state__v changed to "INVALID". |

| Tile Name | Description |
|---|---|
| Invalidated Parent HCOs | Parent HCOs that have been invalidated.<br>Results include Parent HCOs with any record state that have their record_state__v changed to "INVALID". |
| Merged addresses | Addresses that have been merged.<br>Results include the merge loser and the VID of the winning address record. |
| Merged HCOs | HCOs that have been merged.<br>Results includes the merge loser and the VID of the winning record. |
| Merged HCPs | HCPs that have been merged.<br>Results include the merge loser and the VID of the winning record. |

### *Add a tile*

To create a custom tile:

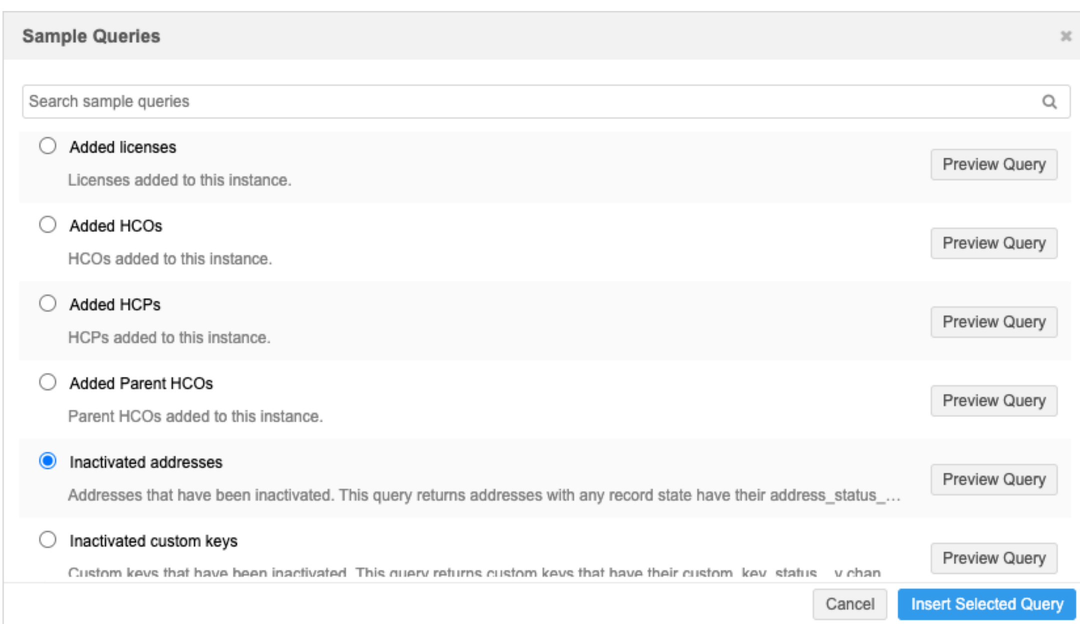
1. On the Job Impact Dashboard page, click **Manage Dashboard**.
2. The Job Impact Dashboard Settings displays the list of tiles. Click **Add Tile**.

   **Important**: The button is dimmed if there are 21 tiles enabled on the dashboard. Remove a tile from the dashboard by changing its status to **Disabled**. The **Add Tile** button will now be active.

3. On the New Tile page, define a meaningful **Name** and **Description**
4. In the **Query** section, add the SQL query for the tile. You can create a new query or customize any of the sample queries.

   **Options**

- **Use a sample query** - Use a sample query as a starting point. You can change the query to suit your requirements.



- **Create a query**

  The SQL of a query is validated as you type.

  Tips for creating a SQL query:

  a. Create the query in the **SQL Query Editor** to confirm it returns the desired results. Then, copy and paste the tested query into the New Tile page.

  b. Queries must include revision history tables (for example, **hcp_revision**, **address_revision**) so the dashboard filters can be applied.

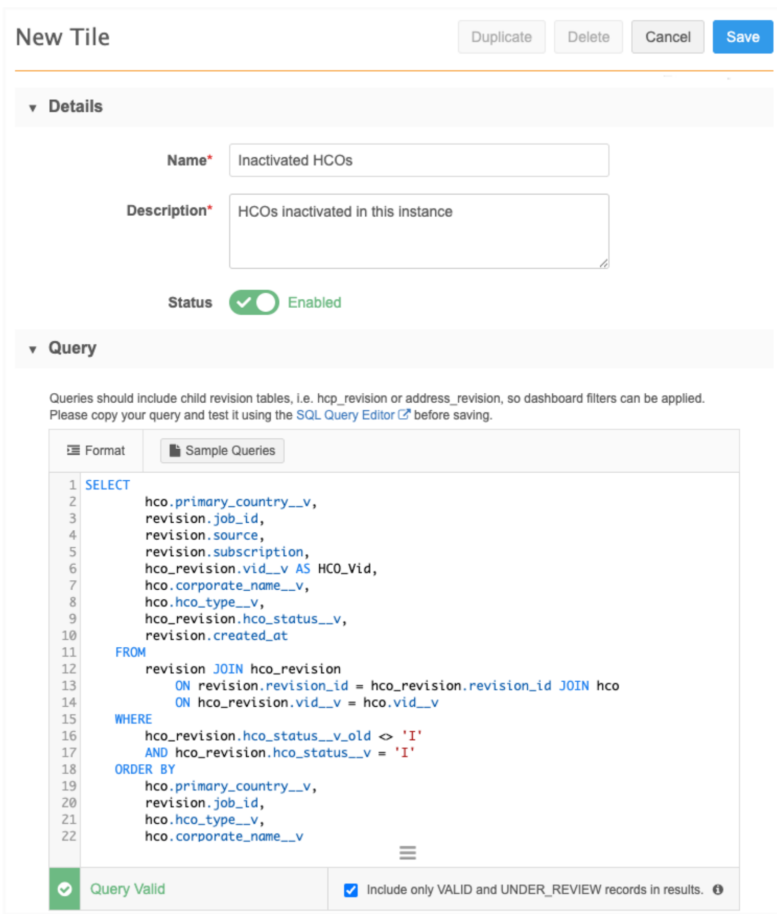
     If a query does not include revision history tables, the query will run and a count will display but it will not use any filter selections.

  c. Tile results count the rows returned by your query.

  d. Results shown in the Network table include fields specified in the `SELECT` section of your query. Include at least the entity `vid__v` field so users can add additional columns in Network tables and they can view individual profiles.

  e. Queries that include the **created_at** revision table field should not use aliases. Time filters cannot be applied if an alias is used. For example, avoid queries that include this and anything similar:

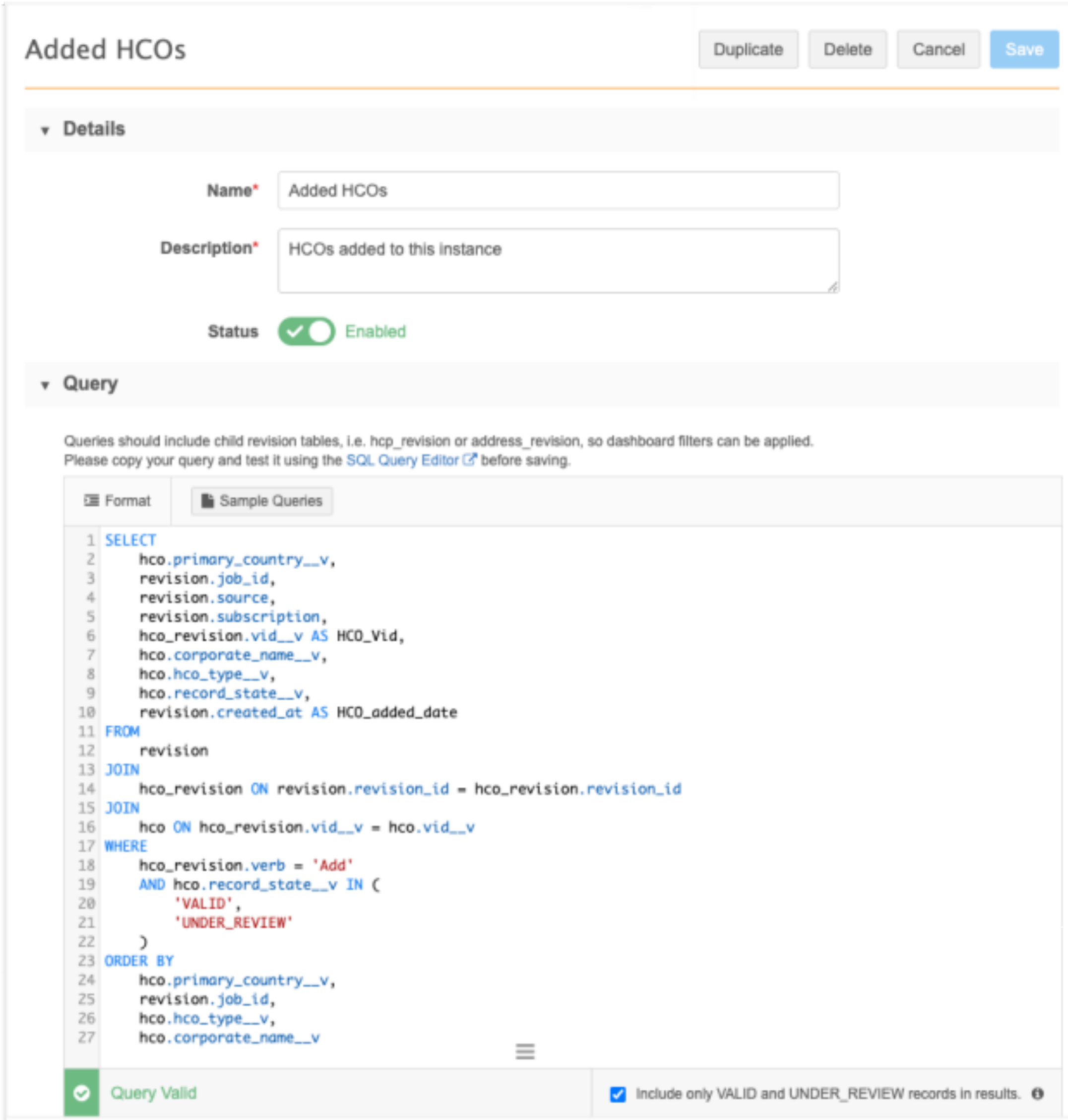
```
select revision.created_at AS Added_date from
```



### *Edit tiles*

On the Job Impact Dashboard Settings page, click a tile name to view the details. You can change any of the existing tiles by updating the name, description, status, or SQL query.

**Tip:** If you change a query, copy it to the **SQL Query Editor** to confirm it produces the desired results.




### *Logs*

Administrators can track updates to the dashboard using the following logs:

- **System Audit History** - View updates made to the tiles on the dashboard.
- **Reporting Audit History** - Track queries run by the dashboard.

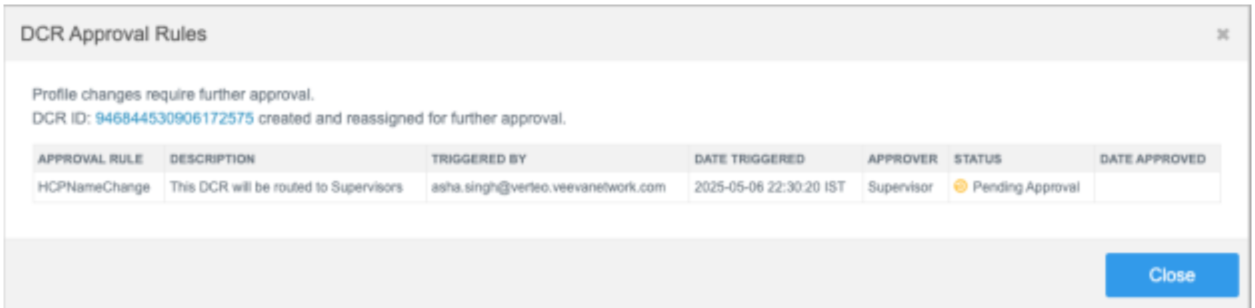
## Data change requests

### MULTI-LEVEL DCR APPROVAL RULES

25R2

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, then the DCR will be routed automatically 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 in this release

#### *Supported objects*

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

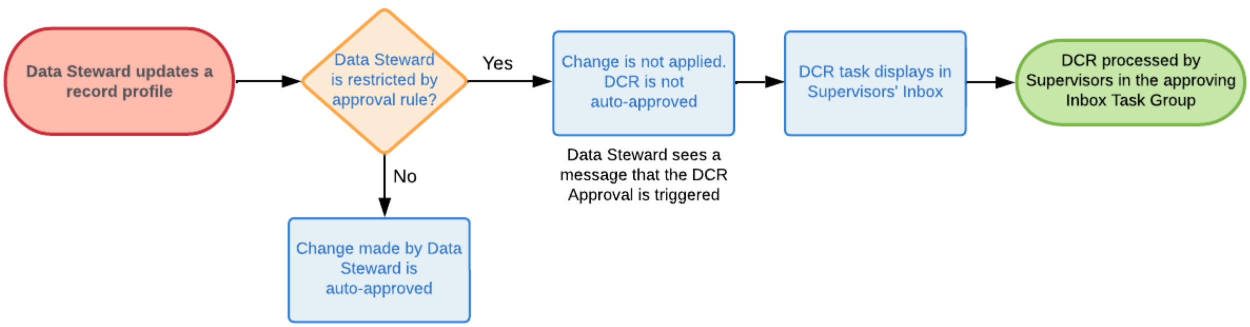
## *Approval process for data stewardship*

### Approval process for changes made on a Profile page

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

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.

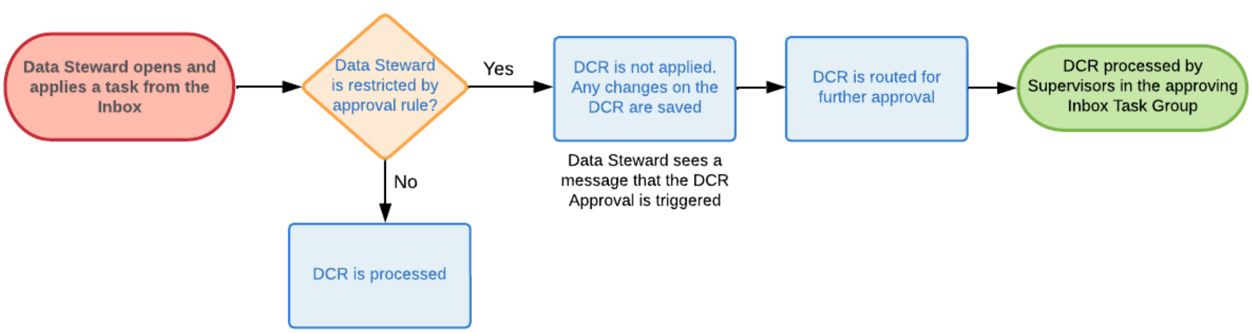
If the Data Steward is not restricted from making the update, the change is automatically approved.




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

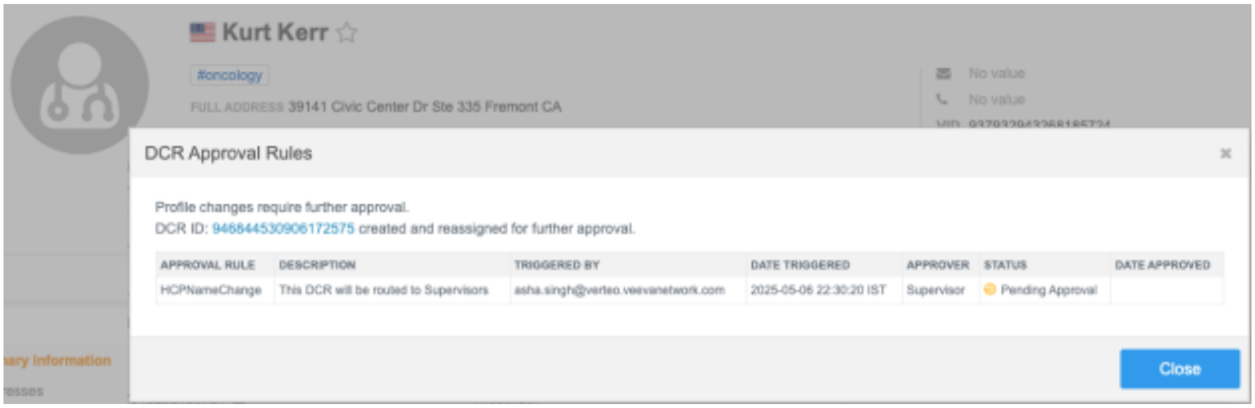
Data Stewards can validate the information and accept or reject changes on add and change requests. If the change triggers a DCR approval rule, the task will be routed to supervisors to process.




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

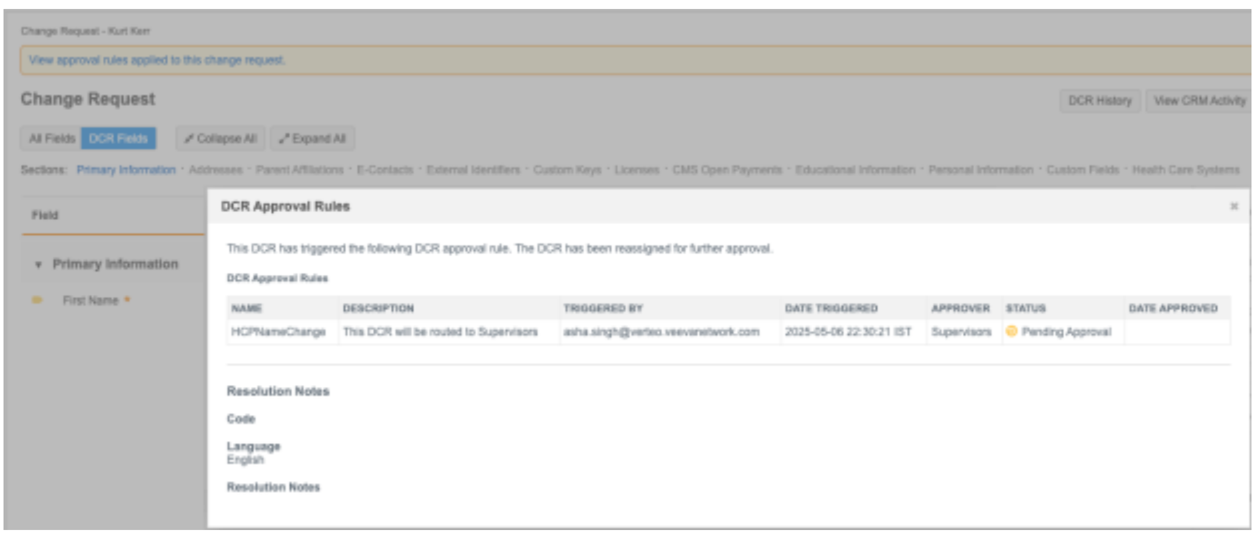
### Approving DCRs

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.



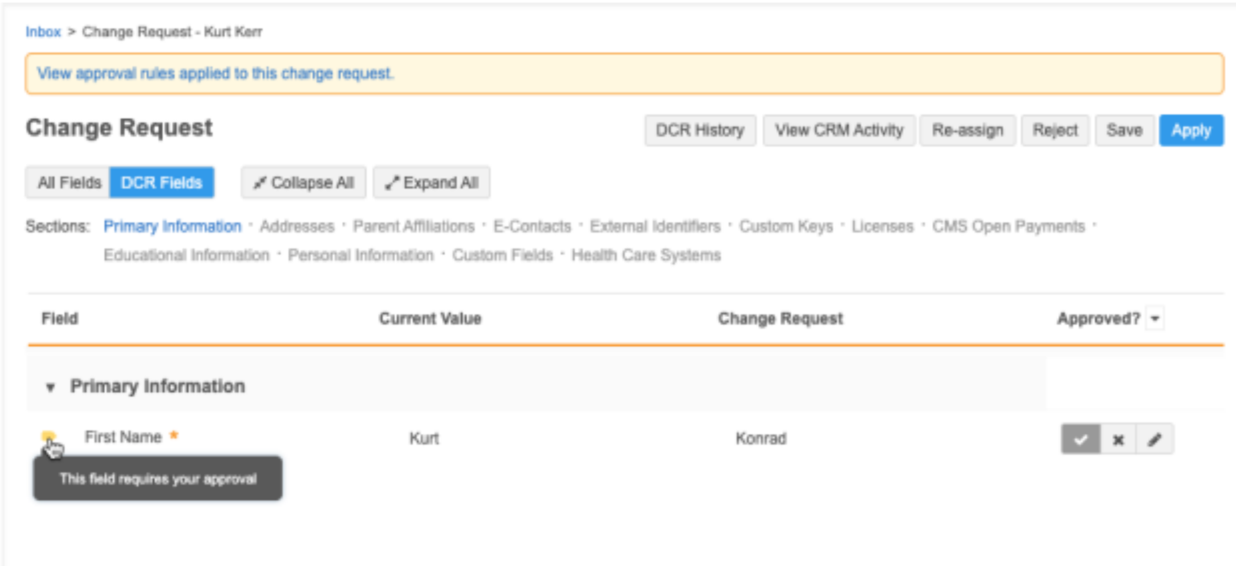

- Click the **DCR ID** link to open the task.

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. 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 in the United States.

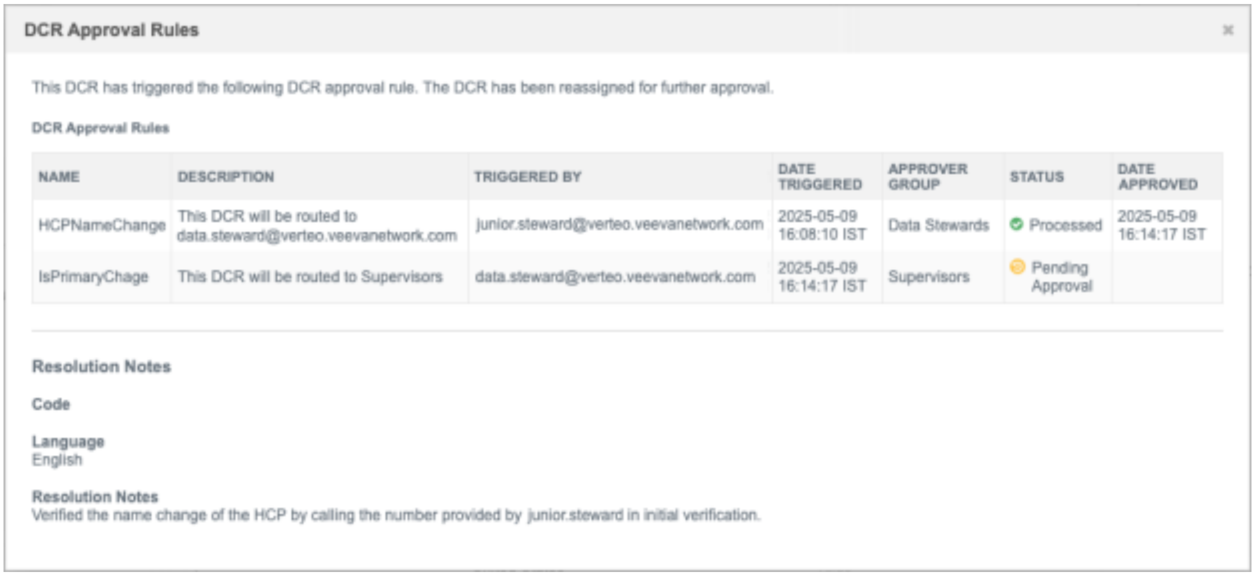
- **HCP Name** (`first_name__v`) - Changes must be approved by experienced Data Stewards.
- **Primary Address** (`primary_address__c`) - Changes must be approved by Supervisors.

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 | first_name__v<br>primary_address__c | Junior Data Steward | Data Stewards |
| 2 | primary_address__c | Data Stewards | Supervisors |

The Junior Data Steward can verify the updates and accept or reject changes to fields that do not require further approval. When they apply the changes, the DCR approval rules are triggered.

- **HCP Name** - The DCR is assigned to Data Stewards to approve the `first_name__v` change.
- **Primary Address** - Then, it will be assigned to Supervisors to approve the `primary_address__c` change.




**Note:** If the Supervisor user assigns the task to themselves after the Junior Data Steward, the Supervisor can process both the changes to the HCP's first name and the primary address. It will simply skip the experienced Data Steward.

### *Process for defining approval rules*

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

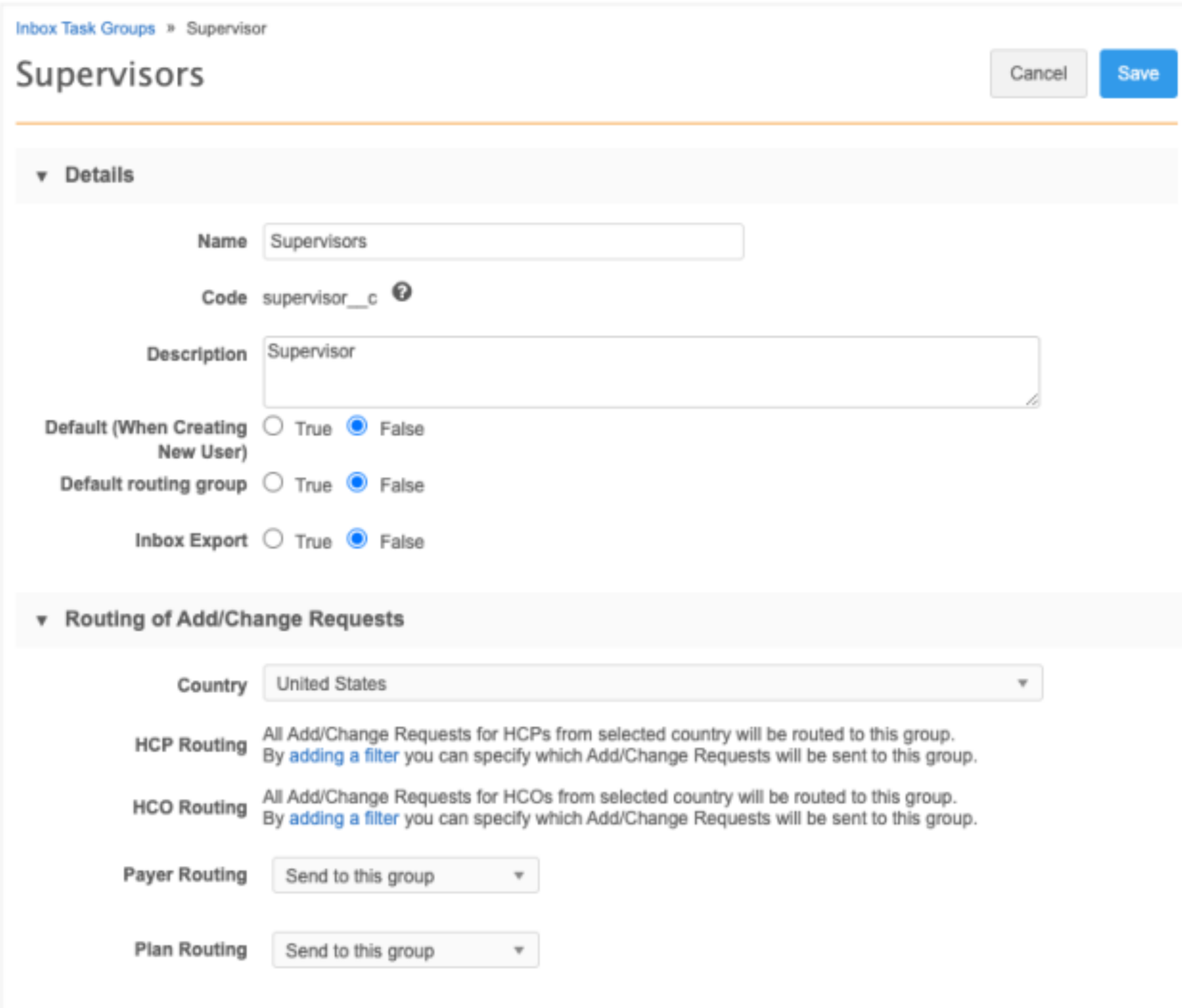
1. **Inbox task group** - Create inbox task groups for experienced Data Stewards or supervisors. These are users that can approve the tasks that triggered the DCR approval rules.
   For rules that apply to multiple countries, an inbox task group must be created for each country's approvers.
2. **User group** – (*optional*) Create a user group or use an existing group for Data Stewards users that will be restricted from approving or rejecting changes on specific records.
   You can also assign specific users to approval rules.
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**.



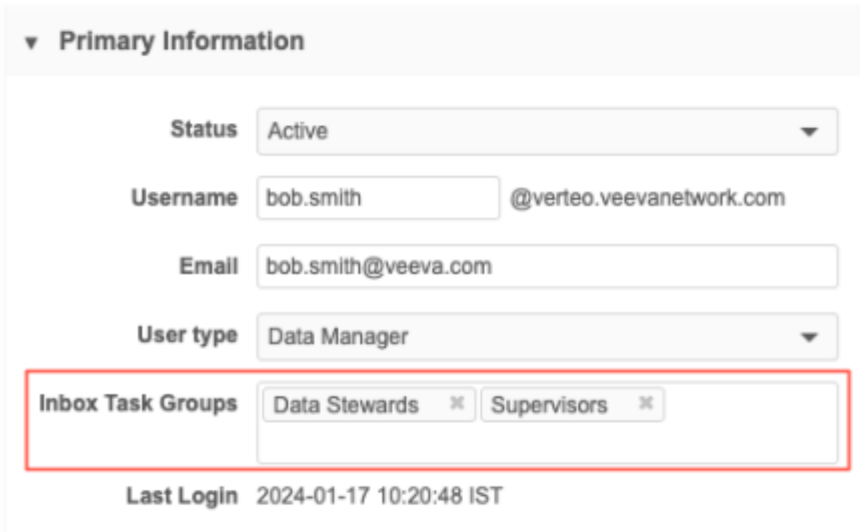

4. Choose the following setting values:
   - **Default (When Creating New User)** - Choose **False**.
   - **Default routing group** - Choose **False**.
   - **Inbox Export** - Choose **False**. (For the Supervisor group, you might choose **True**.)
5. In the **Routing of Add/Change Requests** section,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

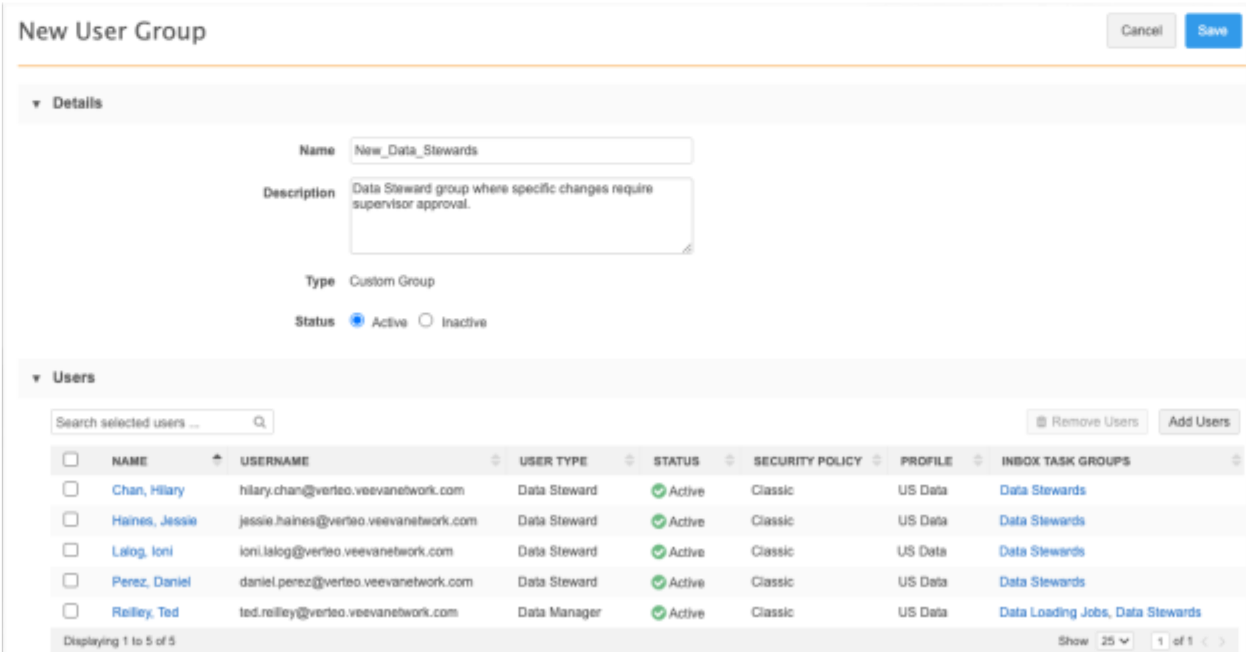
### *Create a user group*

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

DCR approval rules can also be assigned directly to individual user.

To create a group:

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*

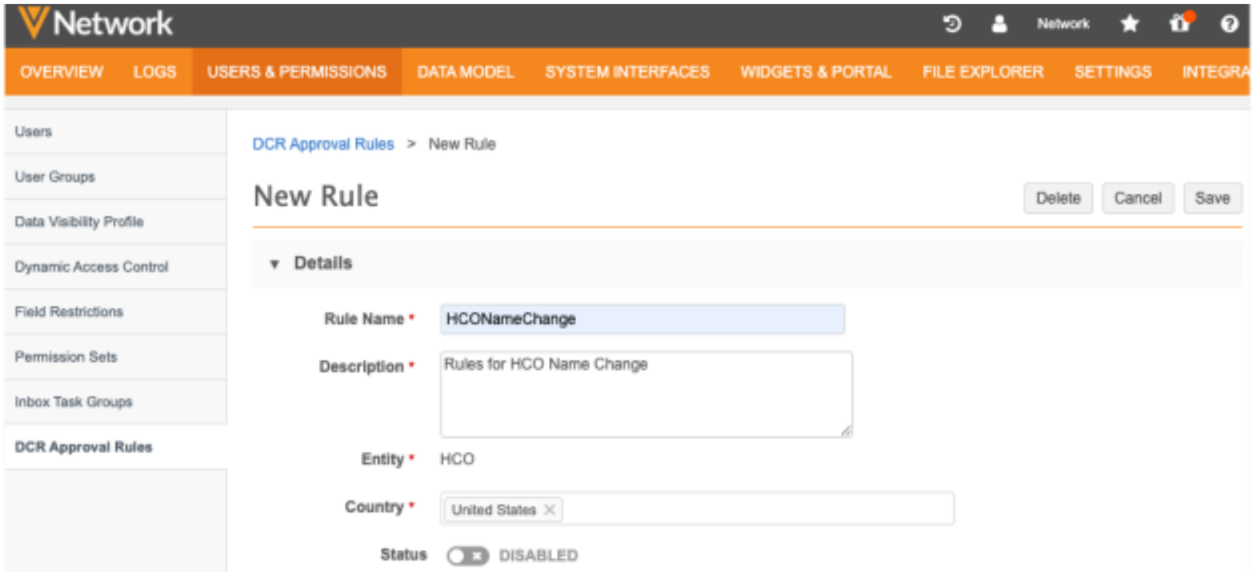
The DCR approval rule contains the fields and values that determine the records and changes that require approval from more experienced Data Stewards.

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.

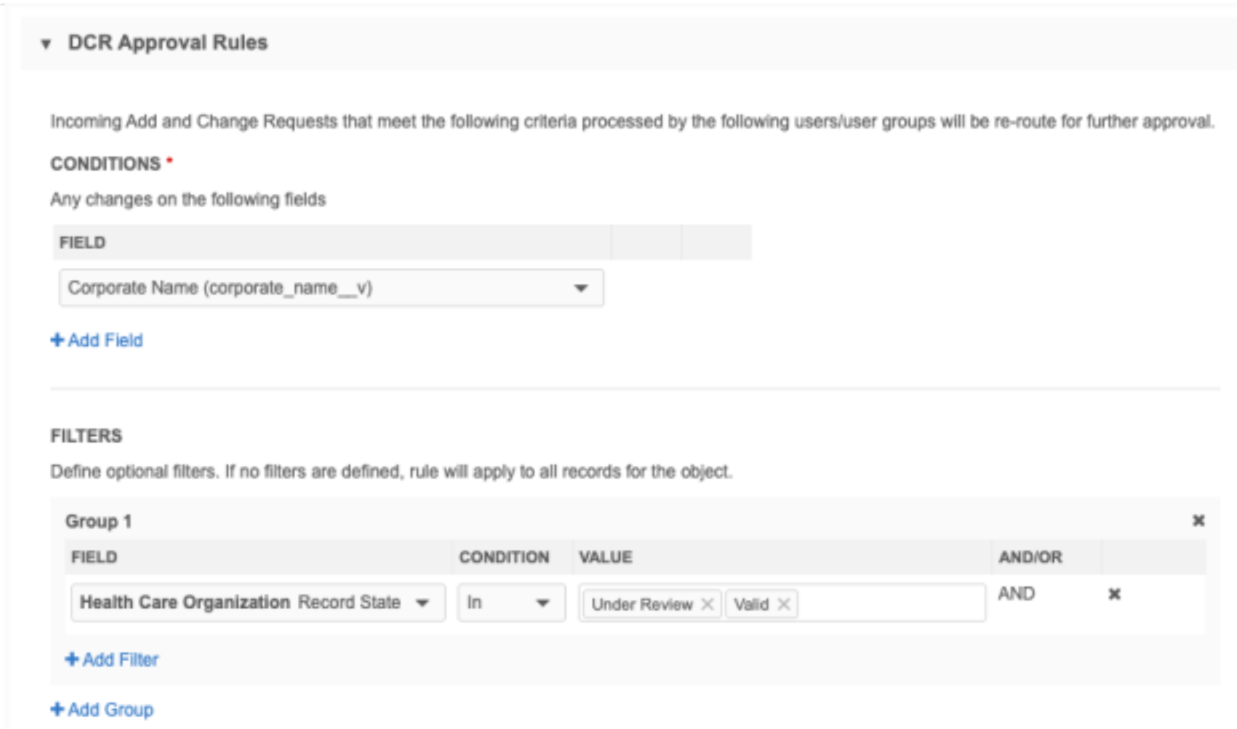
       All fields for the main object and related sub-objects display in the list.

     - **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**

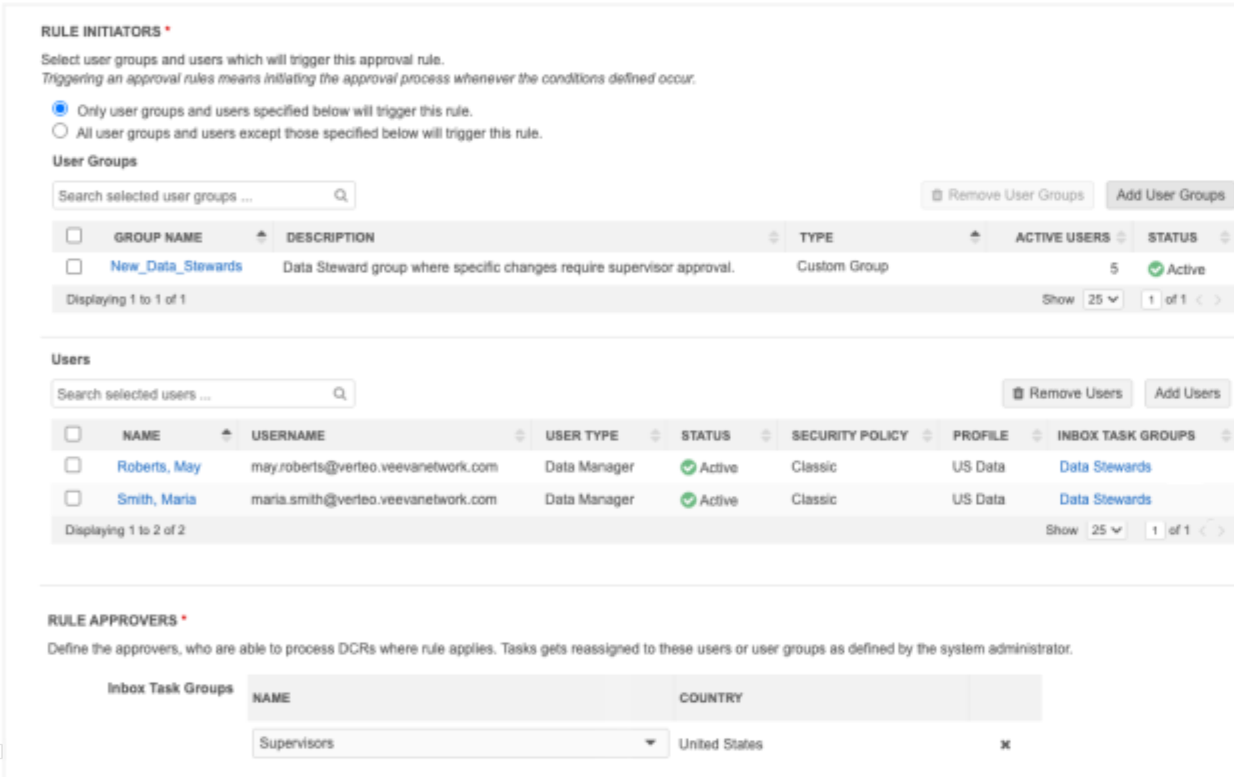
Add a condition that changes to the `corporate_name__v` field will trigger the rule on HCO records. Then, apply a record state filter so the rule is triggered only if the change occurs on a *Valid* or *Under Review* record.




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 not 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.



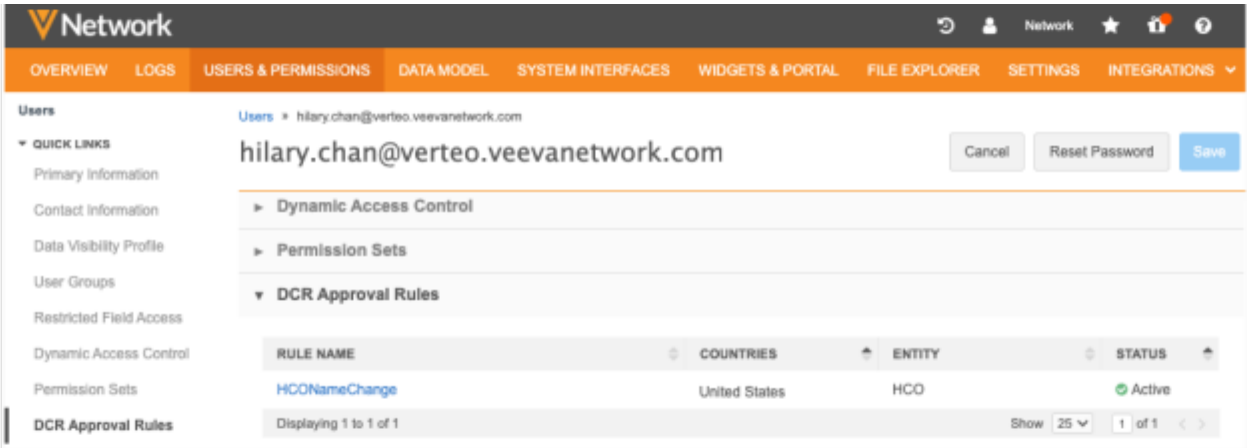

6. **Rule Approvers** - Add the inbox task group for the users that can approve or reject the DCR. The add or change request will be routed to the inbox task group.

> **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.

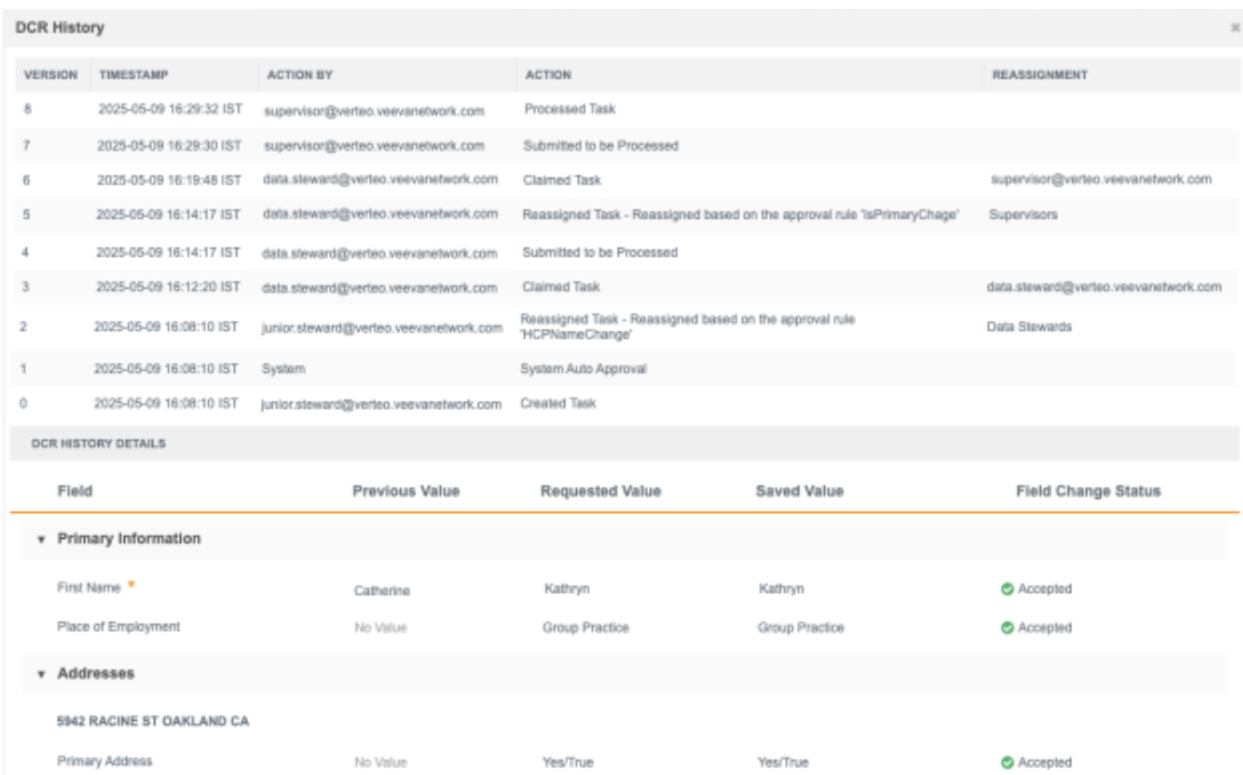
## *User page updates*

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



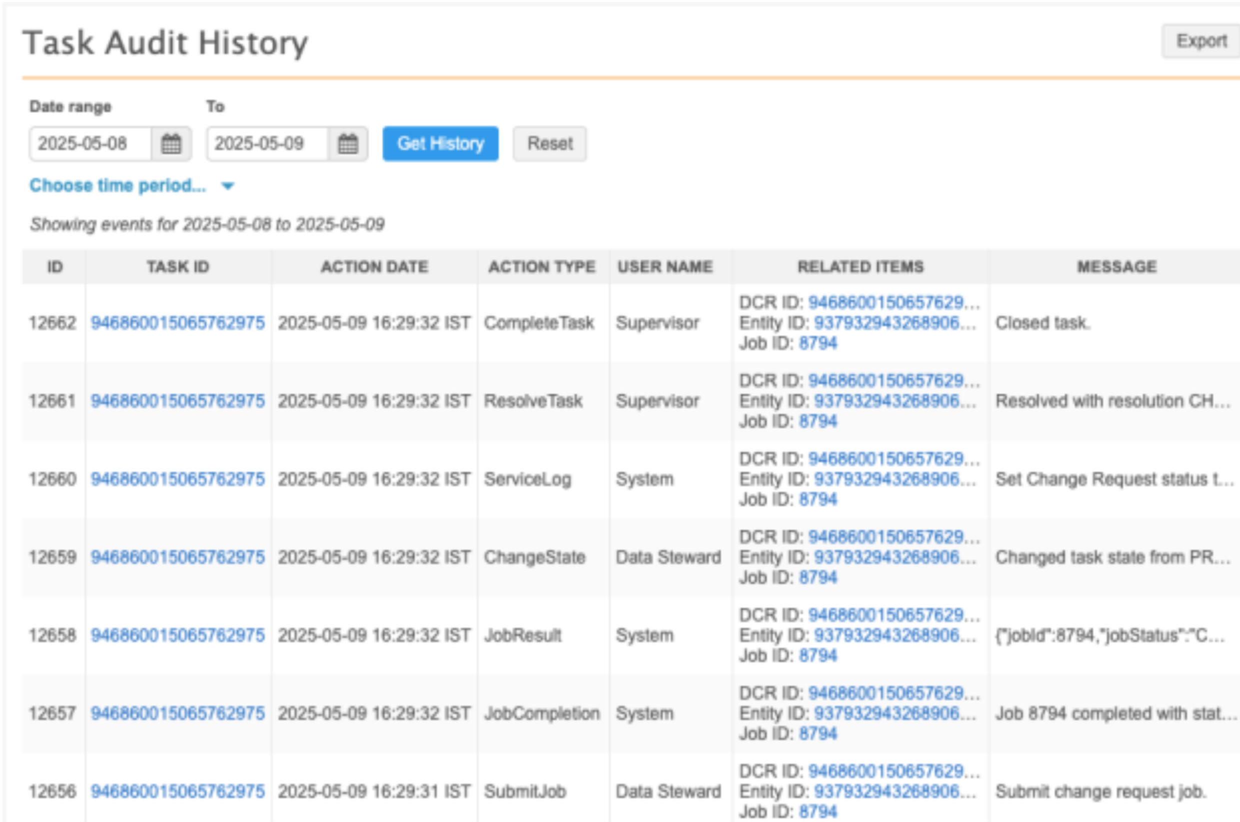

## *DCR History*

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.




| ID | TASK ID | ACTION DATE | ACTION TYPE | USER NAME | RELATED ITEMS | MESSAGE |
|---|---|---|---|---|---|---|
| 12662 | 946860015065762975 | 2025-05-09 16:29:32 IST | CompleteTask | Supervisor | DCR ID: 9468600150657629... Entity ID: 937932943268906... Job ID: 8794 | Closed task. |
| 12661 | 946860015065762975 | 2025-05-09 16:29:32 IST | ResolveTask | Supervisor | DCR ID: 9468600150657629... Entity ID: 937932943268906... Job ID: 8794 | Resolved with resolution CH... |
| 12660 | 946860015065762975 | 2025-05-09 16:29:32 IST | ServiceLog | System | DCR ID: 9468600150657629... Entity ID: 937932943268906... Job ID: 8794 | Set Change Request status t... |
| 12659 | 946860015065762975 | 2025-05-09 16:29:32 IST | ChangeState | Data Steward | DCR ID: 9468600150657629... Entity ID: 937932943268906... Job ID: 8794 | Changed task state from PR... |
| 12658 | 946860015065762975 | 2025-05-09 16:29:32 IST | JobResult | System | DCR ID: 9468600150657629... Entity ID: 937932943268906... Job ID: 8794 | {"jobId":8794,"jobStatus":"C... |
| 12657 | 946860015065762975 | 2025-05-09 16:29:32 IST | JobCompletion | System | DCR ID: 9468600150657629... Entity ID: 937932943268906... Job ID: 8794 | Job 8794 completed with stat... |
| 12656 | 946860015065762975 | 2025-05-09 16:29:31 IST | SubmitJob | Data Steward | DCR ID: 9468600150657629... Entity ID: 937932943268906... Job ID: 8794 | Submit change request job. |

### *Exporting configurations*

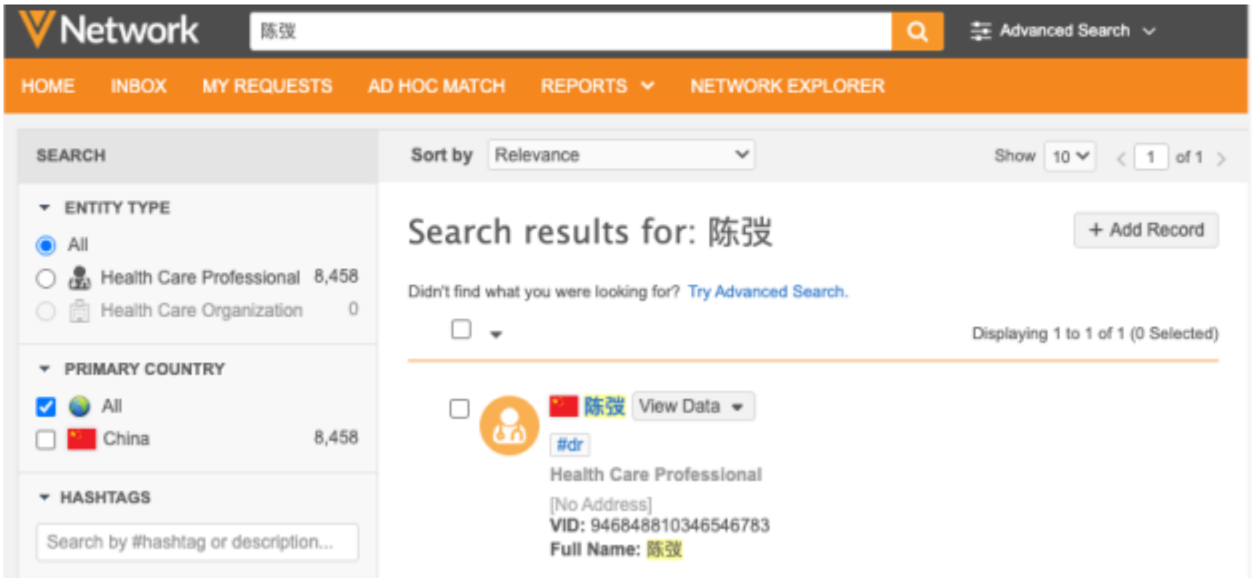
DCR approval rules can be included in export packages to deploy on target environments. Users cannot be included, so the rules will need to be configured with the users from the target environment.

## Data model

### 4-BYTE CHARACTERS

25R1.1

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 enabled by default in your Network instance. Contact Veeva Support to enable 4-byte character support.

## Match

### ADD REQUEST MATCH RULES

25R1.1

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

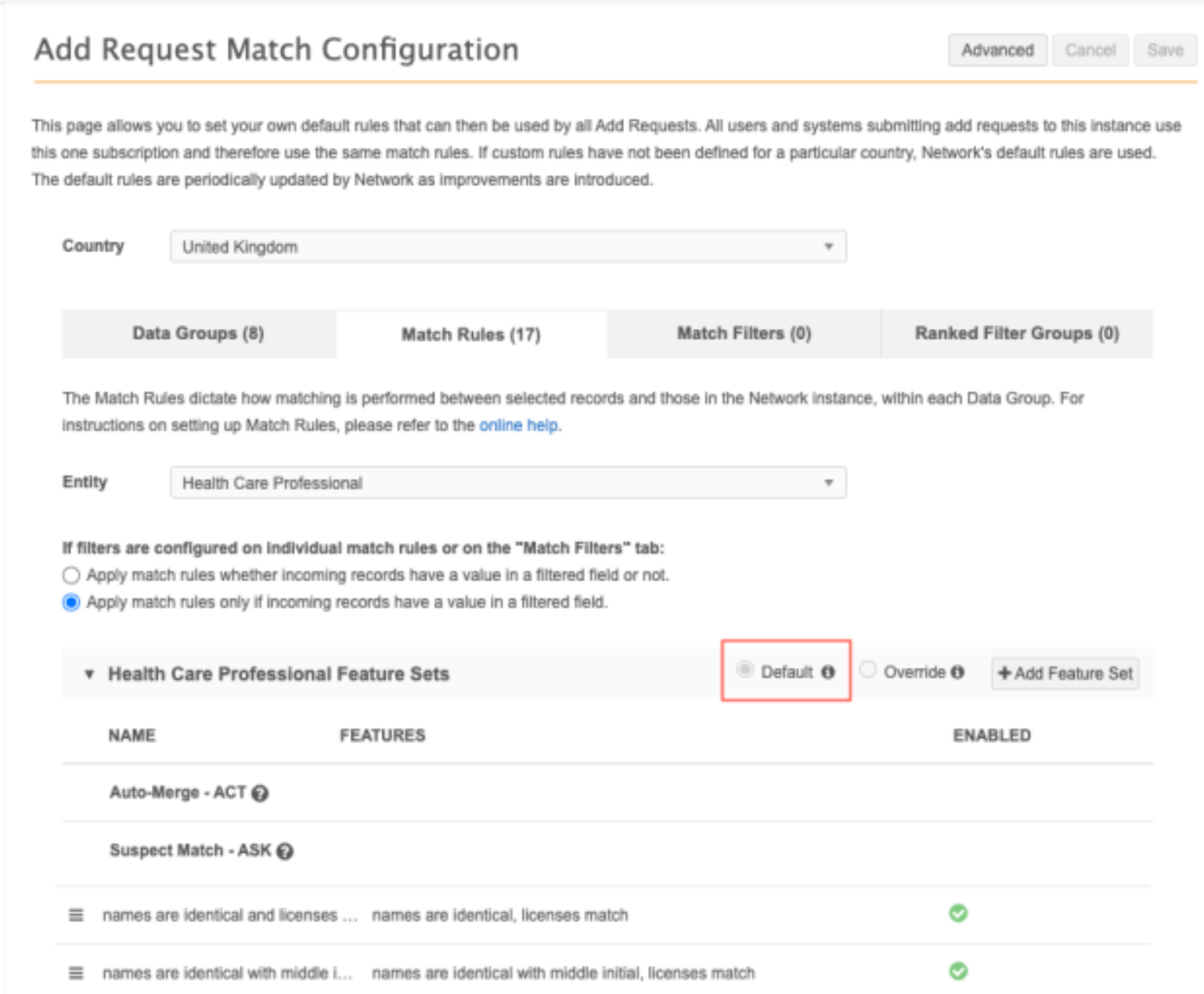
#### *View default match rules*

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.

## Transformation rules

### Target subscriptions

25R2

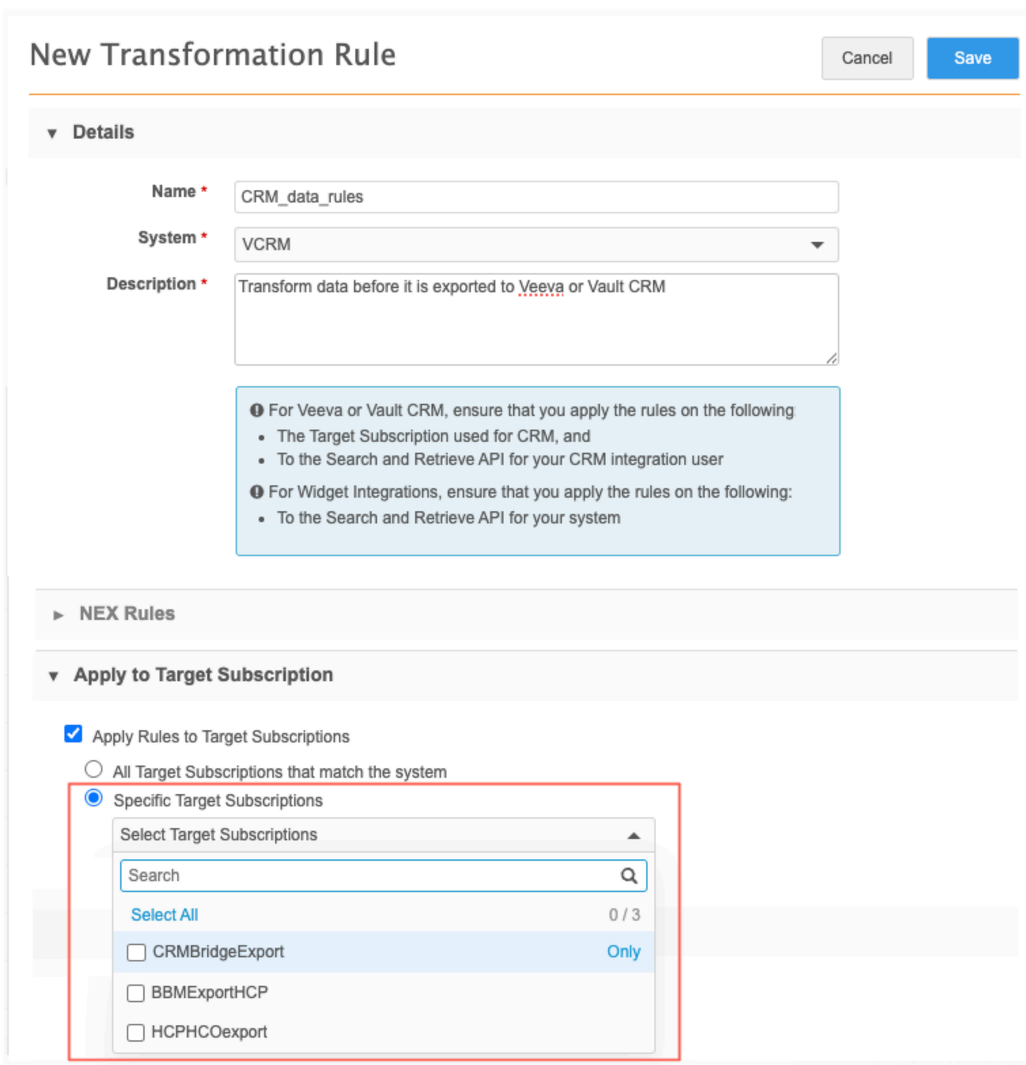
Administrators and Data Managers now have the flexibility to apply a transformation rule to any target subscription, even if it's not associated with the rule's defined system. For example, you can repurpose Vault CRM transformation rules for other target subscriptions with similar requirements.

This enhancement is enabled by default in your Network instance.

#### *New transformation rules*

When you create a rule and choose **Apply rules to Target Subscriptions**, the **Specific Target Subscription** option now lists any enabled target subscription in your Network instance.

Previously, the **Specific Target Subscriptions** list was filtered to include only the target subscriptions associated to the **System** defined for the transformation rule.



### *Existing transformation rules*

Existing rules are not impacted. You can choose to edit the transformation rule to apply it to a target subscription from a different system.

## Subscriptions

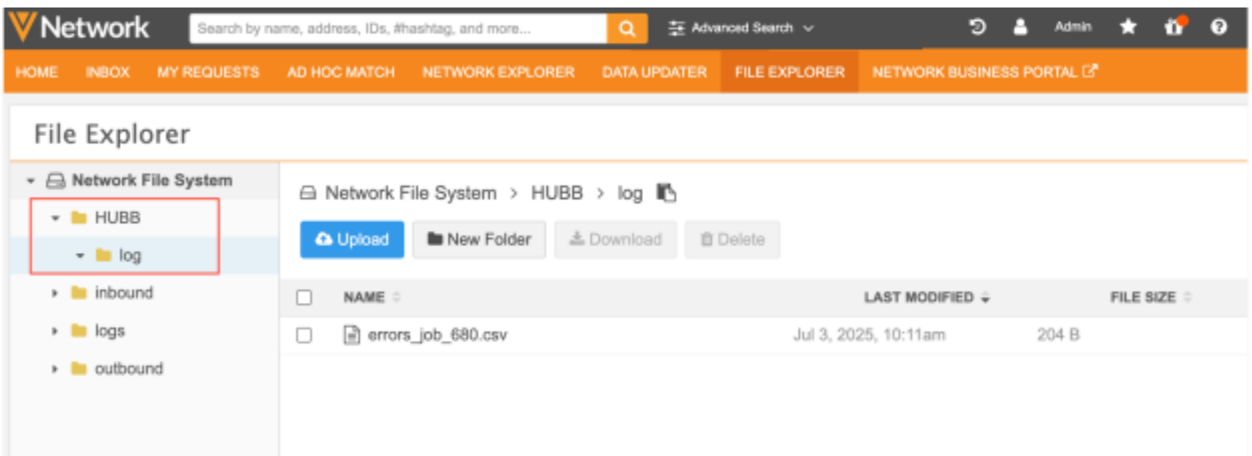
### JOB ERROR LOGS

25R2

Administrators can now define the FTP path for subscription error logs. For example, in a source subscription configuration, you can define a custom path for the logs and Network will create the folders in FTP when the subscription runs.

Previously, errors logs were available on the root level only.

Defining a custom FTP path enables you to give users with limited FTP access the ability to retrieve logs.



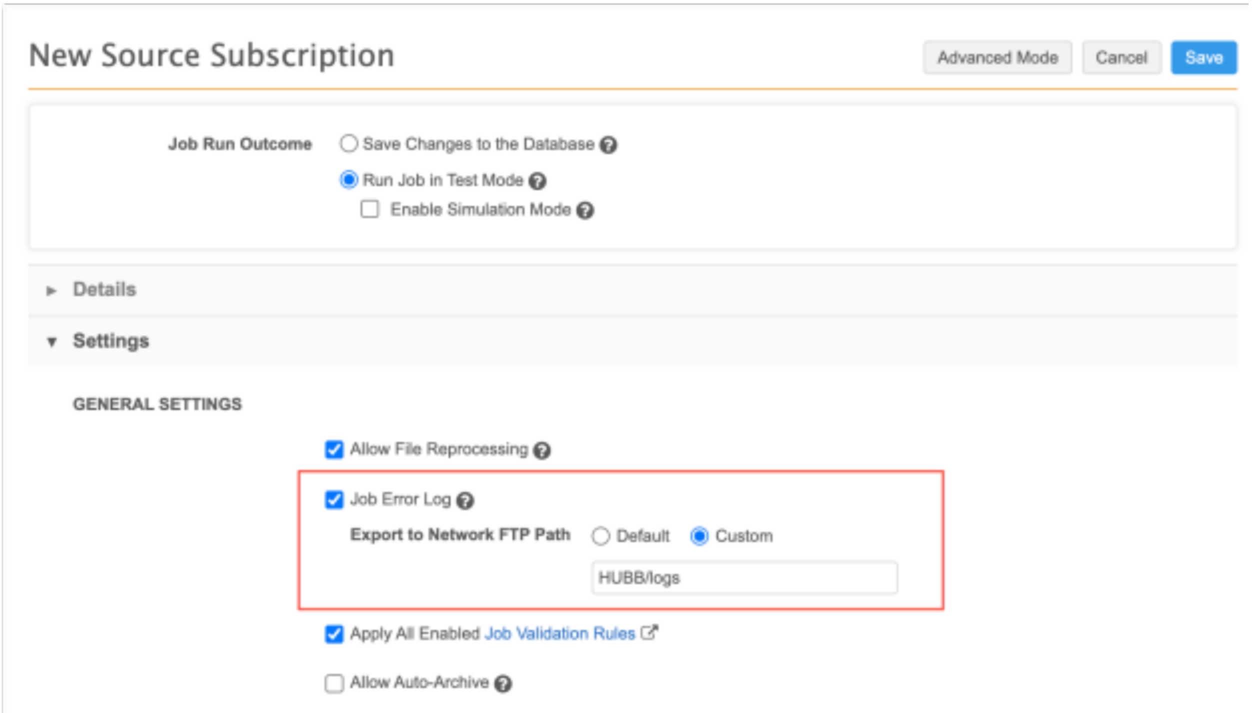

This enhancement is enabled by default in your Network instance.

#### *Supported subscriptions*

- Source subscriptions
- Data maintenance subscriptions

#### *Define a custom log folder*

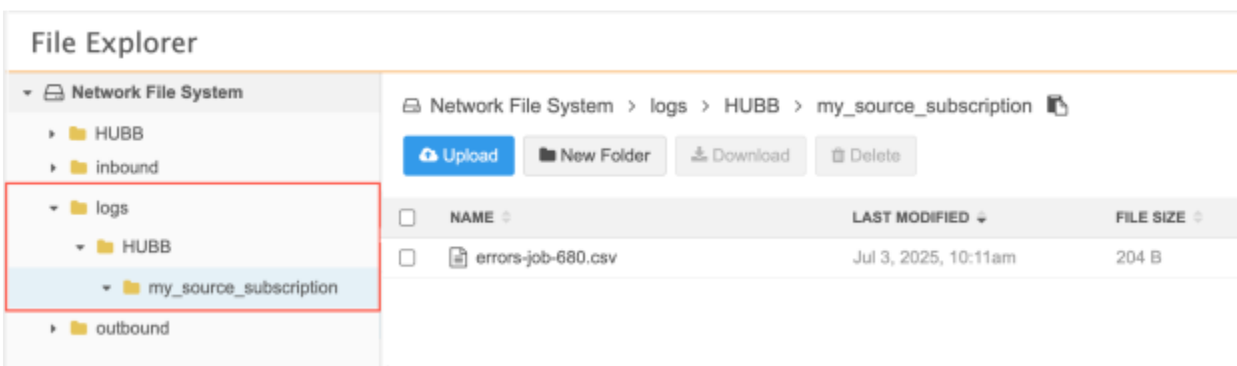
1. Open an existing source subscription or data maintenance subscription.
2. In the Settings section, select **Job Error Log** option.




3. The **Export to Network FTP Path** label displays. Choose where the error log should be created.
   - **Default** - The error log is created in the **logs** directory on the root level with the following folder structure: `logs/<system name>/<subscription name>`.

     **Example**

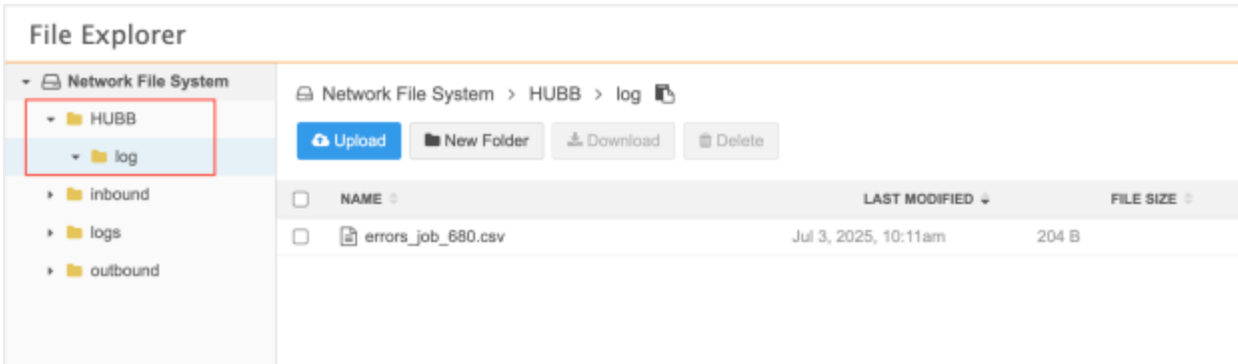
     The error log for *my_source_subscription* for the *HUBB* system is automatically created in `logs/HUBB/my_source_subscription`.



- **Custom** - Define the path for the error log.

  **Example**

  Define the custom job error log path as `HUBB/logs`. When the subscription runs, that directory is created in your Network FTP and the error log is placed in the folder.

  When you save the subscription, the folder will be validated.

  If the folder does not exist, it will be created in the top level of your Network FTP.

### *User access to custom log folders*

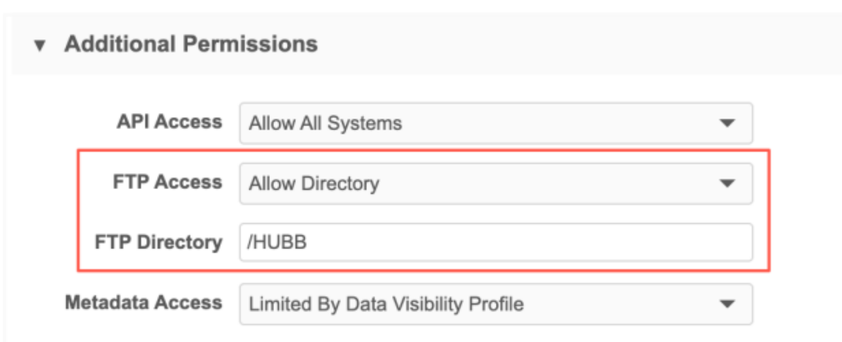
Defining a custom folder for job error logs enables you to give users who need limited FTP permissions access to the logs.

#### Example

An Integration User needs access to files only for a system called HUBB.

Administrators can provide access to the **HUBB** folder in the Network FTP.

- On the user account, set the **FTP Access** permission to **Allow Directory** and specify the HUBB folder.




However, any job error logs for the HUBB system are, by default, in the **log** folder on the FTP root level.

By defining the custom folder, HUBB/logs, for the subscription error logs, the Integration User will also have access to the error logs.

## Source subscriptions

### CONCURRENT JOBS

25R2

Source subscription jobs can now run at the same time to more efficiently support data updates for multiple data domains. For example, you can load Customer Master data (HCPs, HCOs) and Product Master data in parallel. Previously, all jobs (except jobs that ran in simulation mode) were queued while another job was running.

#### *Enable this enhancement*

This enhancement is enabled by default in your Network instance.

#### *Supported objects*

- Custom main objects

#### HCP and HCO considerations

Jobs that load HCPs or HCOs can run concurrently with jobs that load custom objects only.

Jobs that load only Veeva objects (HCPs, HCOs) cannot run at the same time. These jobs must always run sequentially because updates to HCPs often impact HCOs (and vice-versa) through the parent HCO relationship.

#### *How it works*

Subscription jobs can run at the same time if the top-level objects being loaded do not overlap.

To determine the objects, Network checks the model map of each subscription for the defined top-level objects.

- **No overlap of top-level objects** - Jobs can run concurrently.

  **Exception -** Jobs that load HCPs and HCOs are always mutually exclusive.
- **Overlap of top-level objects** - Jobs must run sequentially.

**Examples**

| Job A: Top-Level Objects | Job B: Top-Level Objects | Job Run Type |
|---|---|---|
| HCO | HCO | Sequential |
| HCO, HCP | HCP | Sequential |
| HCO, HCP | BRAND__C, FORM_STRENGTH__C, PACKAGE__C | Concurrent |
| BRAND__C | PACKAGE__C | Concurrent |
| BRAND__C, FORM_STRENGTH__C | FORM_STRENGTH__C, PACKAGE__C | Sequential |

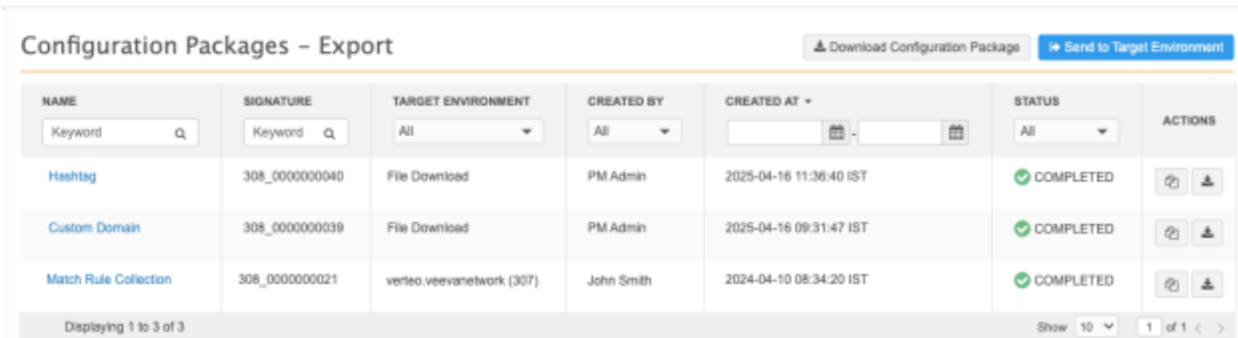
## Configuration management

### DEPLOYING CONFIGURATIONS TO ANY TARGET INSTANCE

25R2

Configurations can now be shared with any target environment. Administrators can create packages and download them locally so they can be uploaded and deployed to any Network sandbox.

This enhancement provides more flexibility for sharing configurations between environments. Previously, export packages could only be shared with target environments linked to the source environment.




The enhancement is available by default in your Network instance.

### *Export options*

Administrations can now choose one of the following options on the Configuration Packages - Export page (**Settings > Configuration Export**):

- **Download Configuration Package** - Create a .zip file that you can download locally and deploy to any Network Sandbox instance.

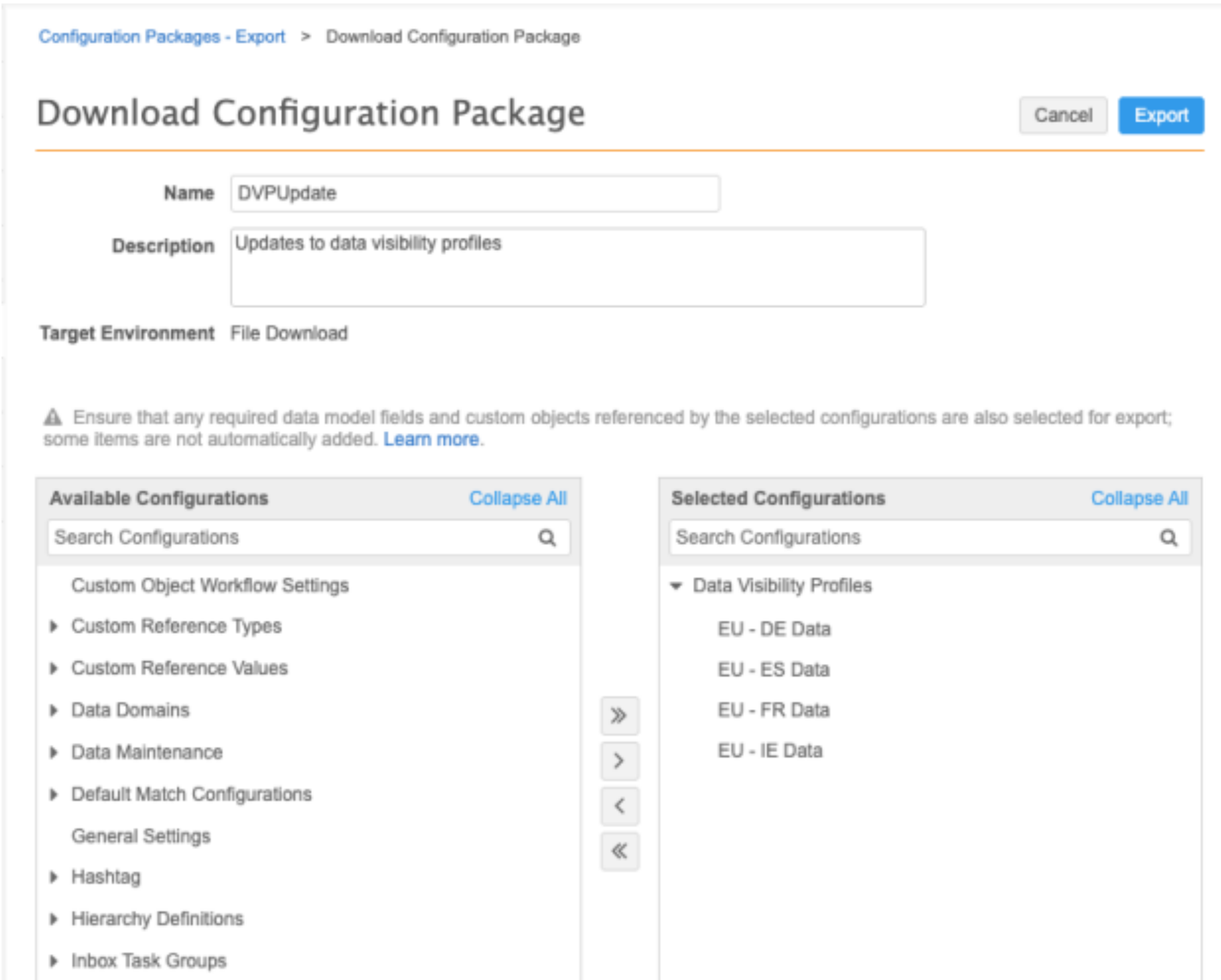
  Previously, this option was called **Ad Hoc Download**. The file could be used for review purposes only; it could not be transferred to a target environment.

- **Send to Target Environment** - Transfer the export package to a specific Network instance.

  This option was previously called **Create Export Package**.

### *Creating an export package*

Administrators can now choose to create a file to download to a local computer instead of transferring it directly to a target environment.



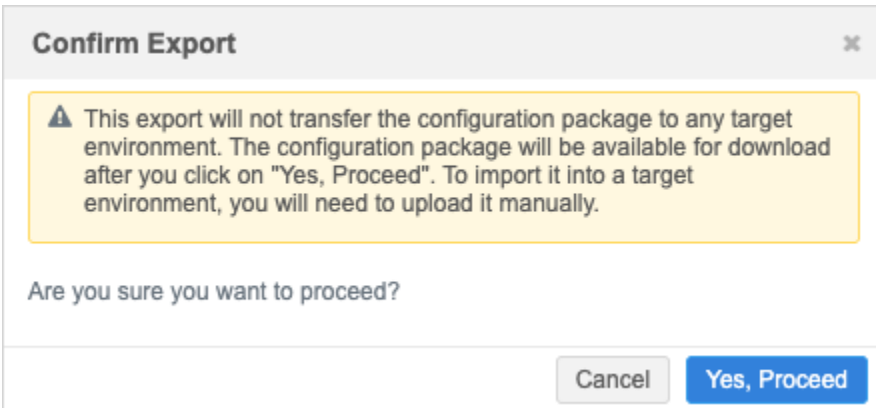

To create a file to download:

1. In the Admin console, click **Settings > Configuration Export**.
2. On the Export page, click **Download Configuration Package**.
3. On the Download Configuration Package page, type a meaningful **Name** and **Description**.
4. The **Target Environment** is set to **File Download**.
5. Select the configurations to export by expanding the nodes in the **Available Configurations** pane and moving your selections to the **Selected Configurations** pane.

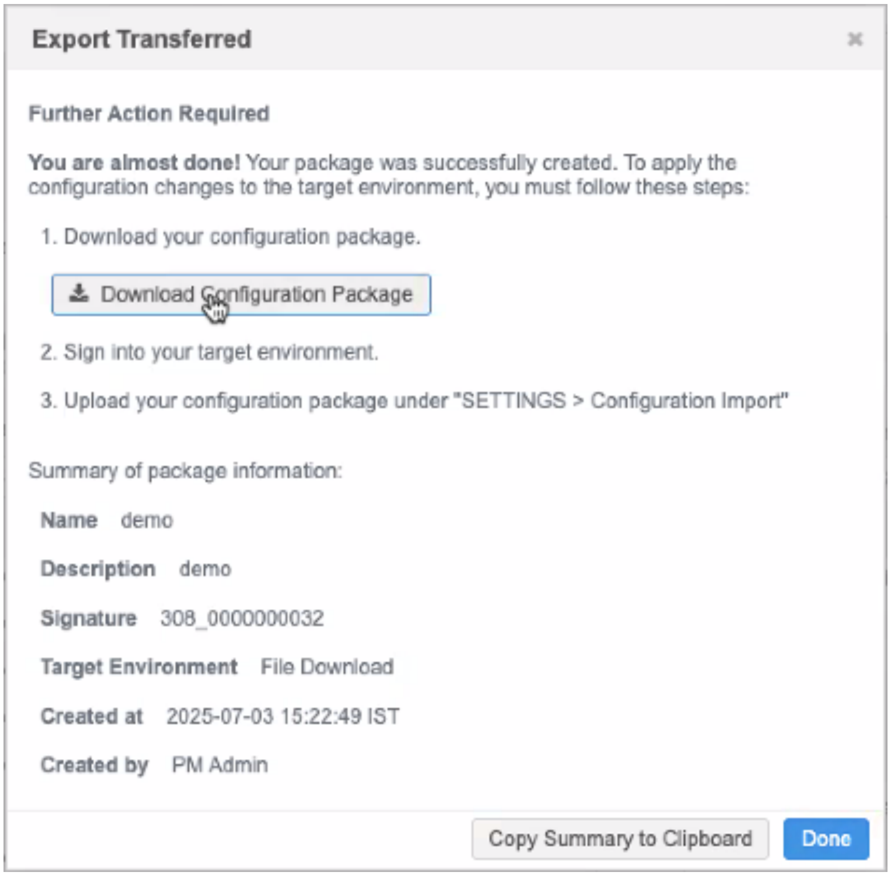
6. Add dependencies to the export package.

   When you move configurations into the **Selected Configurations** pane, the selections are validated to check for dependencies. For Veeva standard objects and custom objects, most dependencies are automatically added. Dependencies are not added for custom data model fields and some custom object dependencies. For more information, see Custom object dependencies in the *Veeva Network Online Help*.

7. If you remove configurations from the selection, the package must be validated again by clicking the **Validate** button.
8. Click **Export** to create the file.
9. A dialog displays to remind you that the file will be downloaded and not exported to a target environment. To confirm and create the file, click **Yes, Proceed**.




10. The Export Transferred dialog displays with the details of the package. Click **Download Configuration Package**.



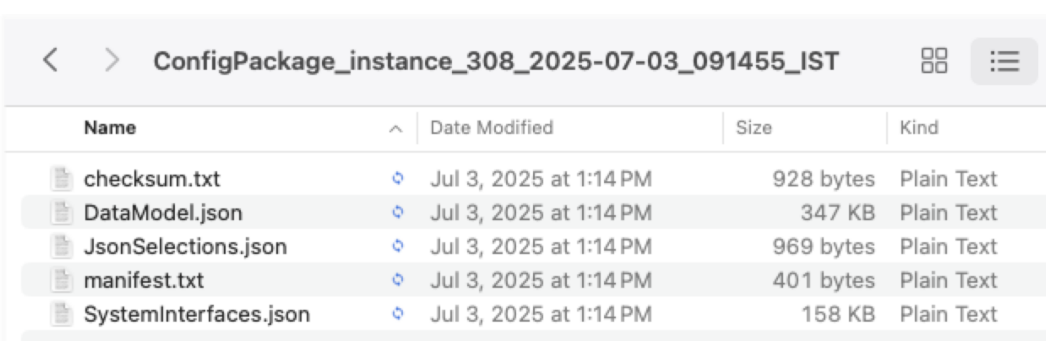

To close the dialog, click **Done**.

11. The Details page for the file package displays. You can **Download** or **Clone** the package from this page.

### *Review the exported package file*

The file is downloaded to your local computer with the following naming convention: `ConfigPackage_instance_<instance_ID>_<date>_<time>_<timezone>.zip`.

Example: `ConfigPackage_instance_308_2025-07-03_091455_IST`.



The package contains the following files:

- **checksum.txt** - This is a new file that is used to validate that the package has not been changed after it was created.

  > **Important**: No changes can be made to the package. It must be imported to the target instance in its original form.

- **manifest.txt** - Metadata of the package.

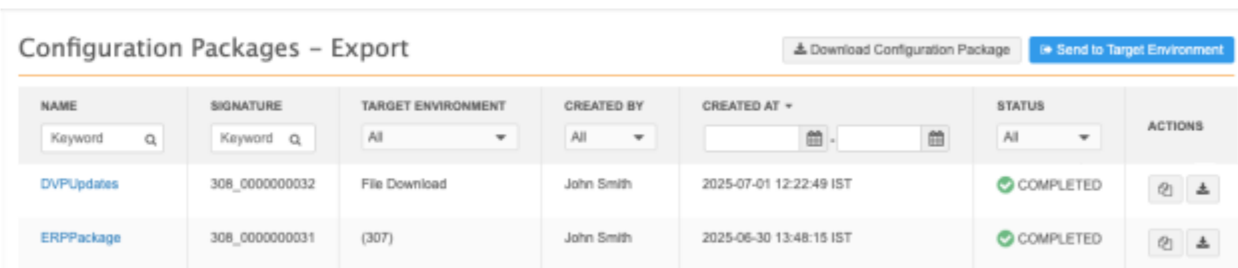
  The file includes the package version. Packages created before the **Download Configuration Package** option was available are version 1.2 and lower. The file must be version 1.3 or higher for files to be validated when they are uploaded to a Sandbox instance.

- **JsonSelections.json** - Stores the configurations selected for the package.
- **.json file** - A file for each configuration category.

### *Configuration Packages - Export page*

Administrators can quickly identify packages that are created as file downloads on the Configuration Packages - Export page.

The **Target Environment** column displays **File Download**.



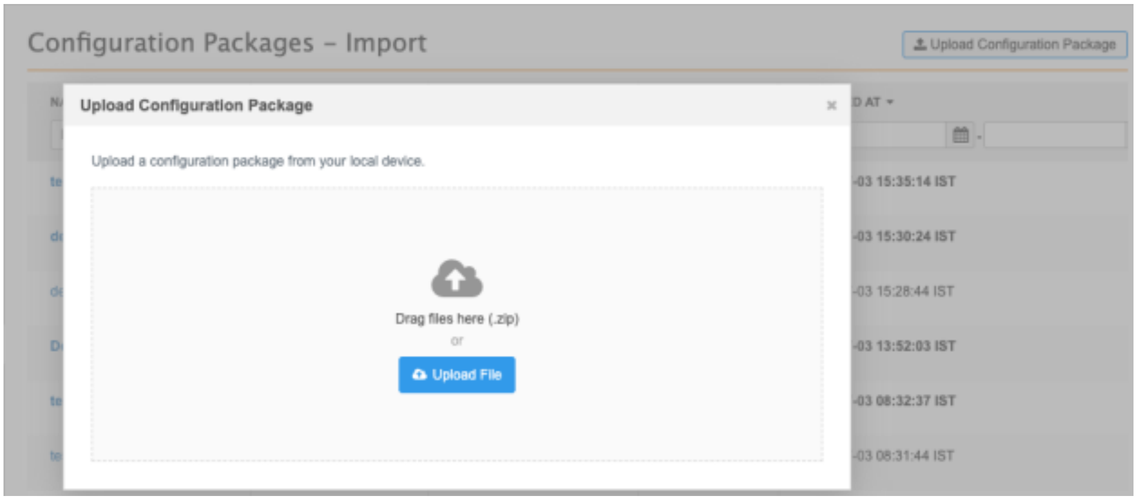

### *Importing file packages*

> **Important**: Files can be imported to Sandbox instances only. Test and verify the imported configurations on the Sandbox first and then export them to a Production instance.

To import the file:

1. In the Admin console, click **Settings > Configuration Import > Upload Configuration Package**.

   The **Upload Configuration Package** button is not active in Production instances.

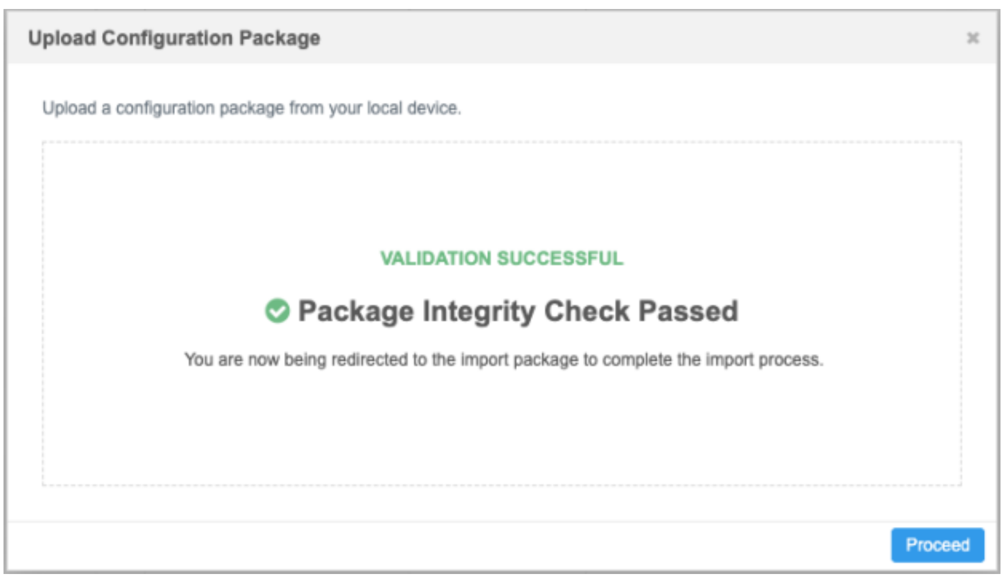



2. Choose the .zip file package from your local computer.

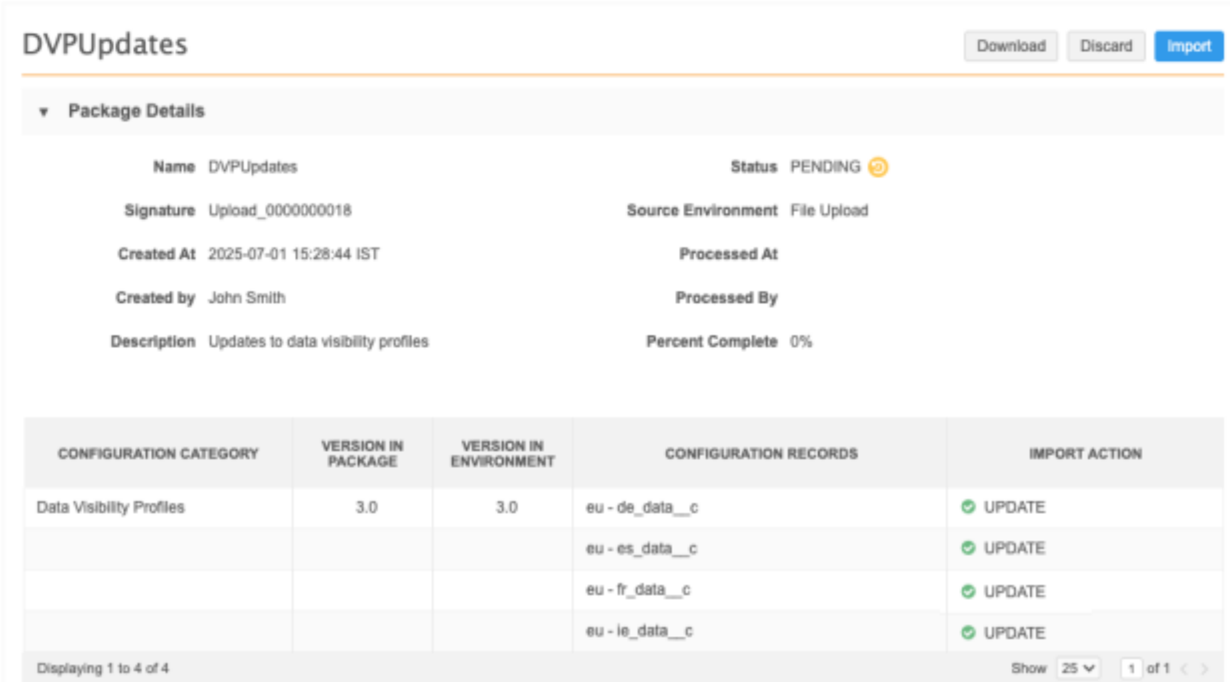
   **File requirements**

   - **Type** - Must be a .zip file.
   - **Size** - 50MB maximum.

3. The file is validated to ensure that it hasn't been modified since it was downloaded. If validation passes, click **Proceed**.




4. The package details display. Click **Import** to apply the configuration to the instance.




### *Configuration - Import page*

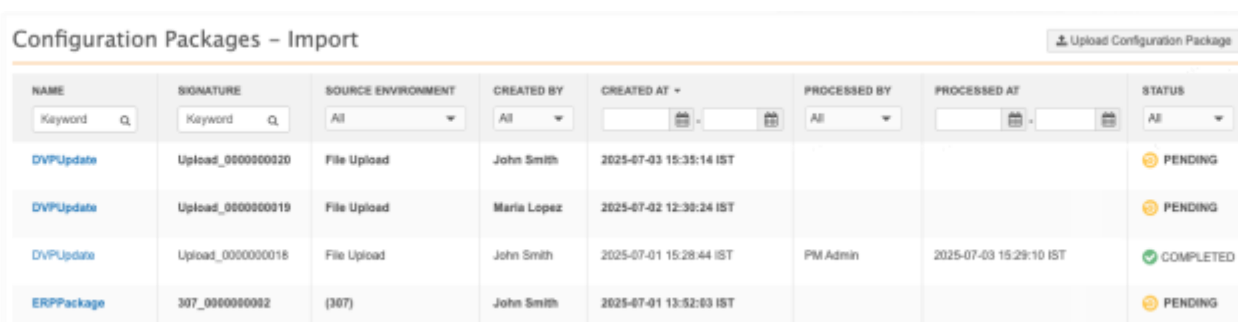
Administrators can easily identify the packages that were uploaded as a file.

Key details:

- **Source Environment**- Specifies **File Upload**.
- **Signature** - For file uploads, the naming convention is `Upload_`<*incremented number*>.

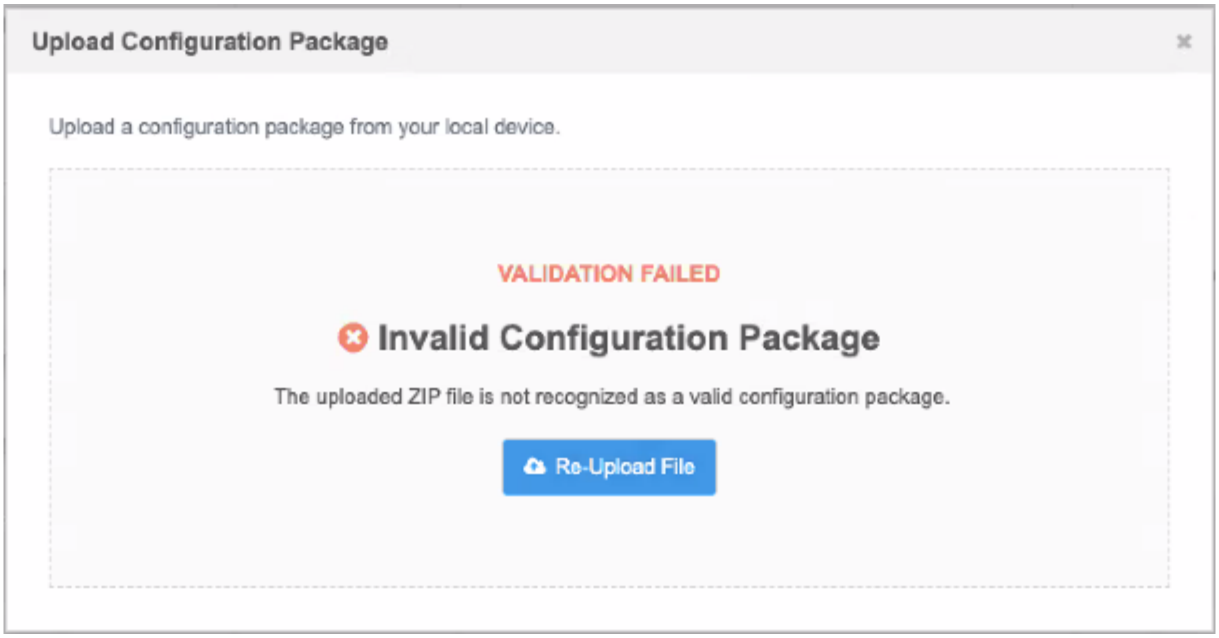
  A file can be uploaded multiple times, so the number is incremented for each upload.
- **Status** - Packages that have not been applied to an instance yet are **Pending**.

  Pending packages are highlighted.
- **Created by** - The user that uploaded the file to the instance.



### *Import file validation*

When you import a file to a target instance, it is validated for several factors.




The following errors can occur.

- **Invalid Configuration Package** - The package is missing one or more of the following files:
  - manifest.txt
  - checksum.txt
  - at least one Network configuration (.json) file.

  This error can also display if you unzip a file and then zip it again (but didn't change the content) on a Mac because MacOS adds metadata (hidden files to the zip archive).

- **Unsupported Configuration Package Version -** The export format version is 1.2 or lower. The package was created before file uploads were supported.

  Package versions are in the manifest.txt file. Check the file to see the version.

- **Package Integrity Check Failed** - One or more files in the package have been changed since it was downloaded.
- **Invalid file format** - The file is not a .zip file.
- **File Size Limit Exceeded** - The .zip file is larger than 50 MB.

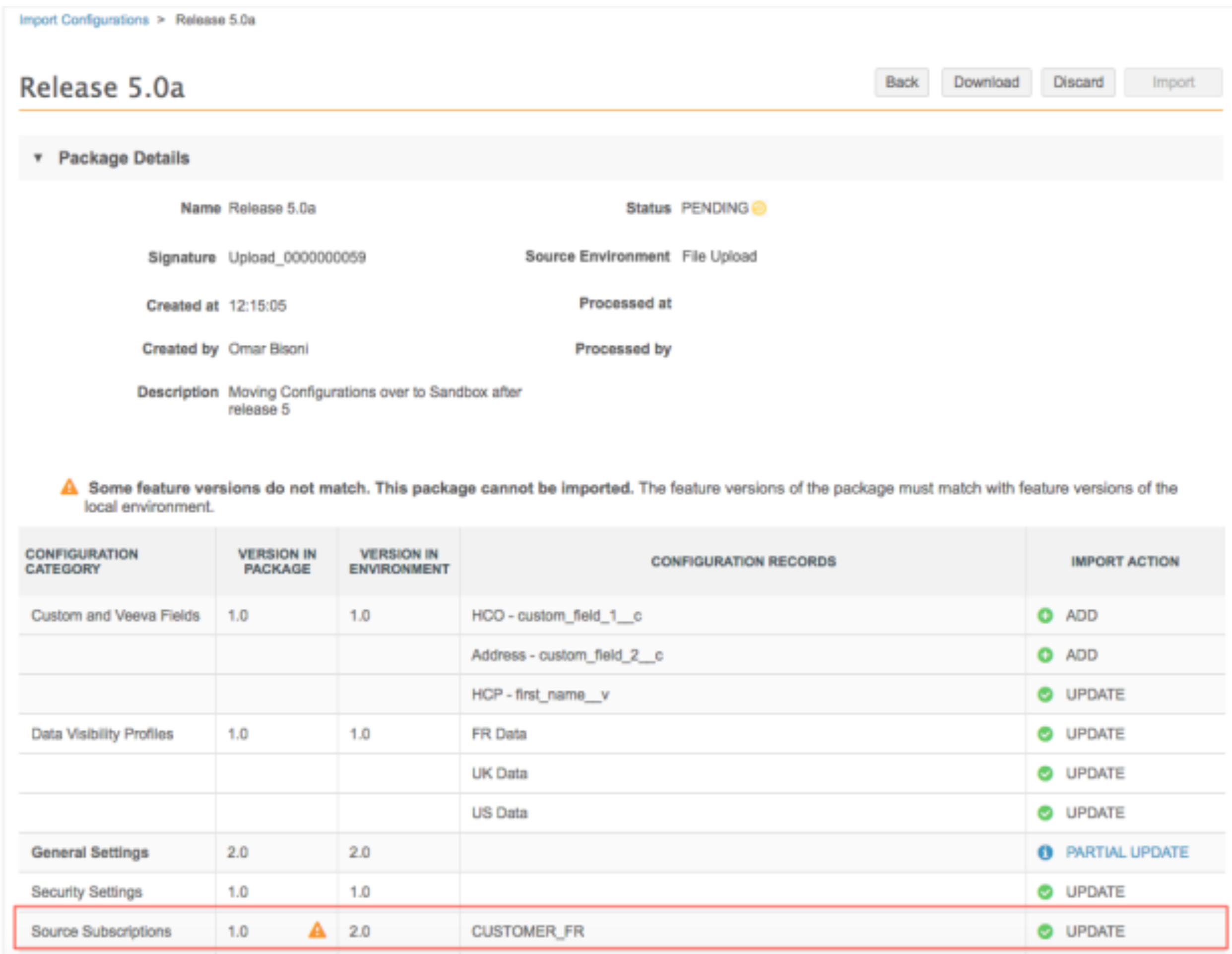
### *Incompatible configuration packages*

Packages that contain feature versions that do not match can be uploaded to a target Network instance but it cannot be imported.

Open the Pending package to see the feature versions that do not match. A **Warning** icon displays in the **Version in Package** column.

Feature versions are increased when enhancements are added.

Recreate the package in the source environment and upload it again.



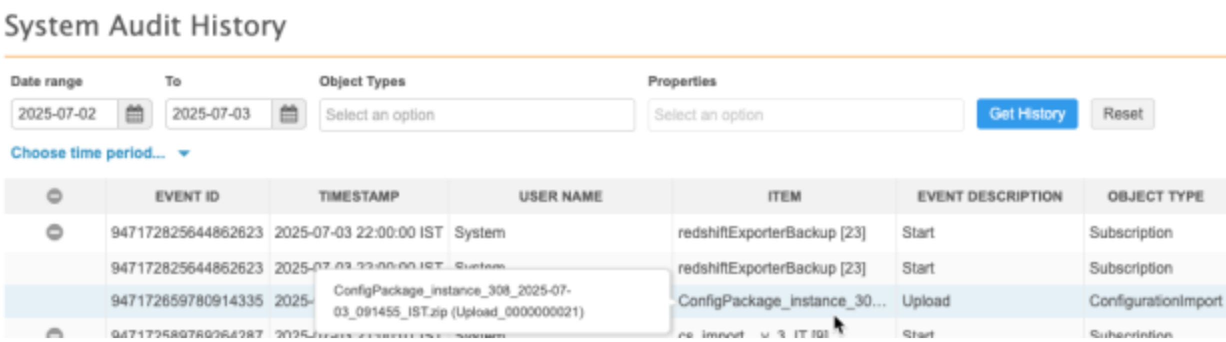
### *Logs*

Administrator can track configurations that are uploaded from a local computer to the Network instance in the System Audit Log (**Logs**).

**Event details**

- **User Name** - The user that imported the file.
- **Item** - The configuration package name and the signature.

  Hover over the Item value to see a pop-up with the details.
- **Event Description** - Upload
- **Object Type** - ConfigurationImport



## Workflow settings

### AUTO-APPROVE CHANGE REQUESTS FOR SUB-OBJECTS

25R2

Administrators can configure the workflow settings to auto-approve change requests for locally owned sub-objects. Previously, sub-objects could be auto-approved for new locally owned sub-objects only.

This enhancement is enabled by default in your Network instance.

#### *Supported records*

Sub-object changes can be auto-approved on all records.

- Locally records
- Veeva OpenData records
- Third party records

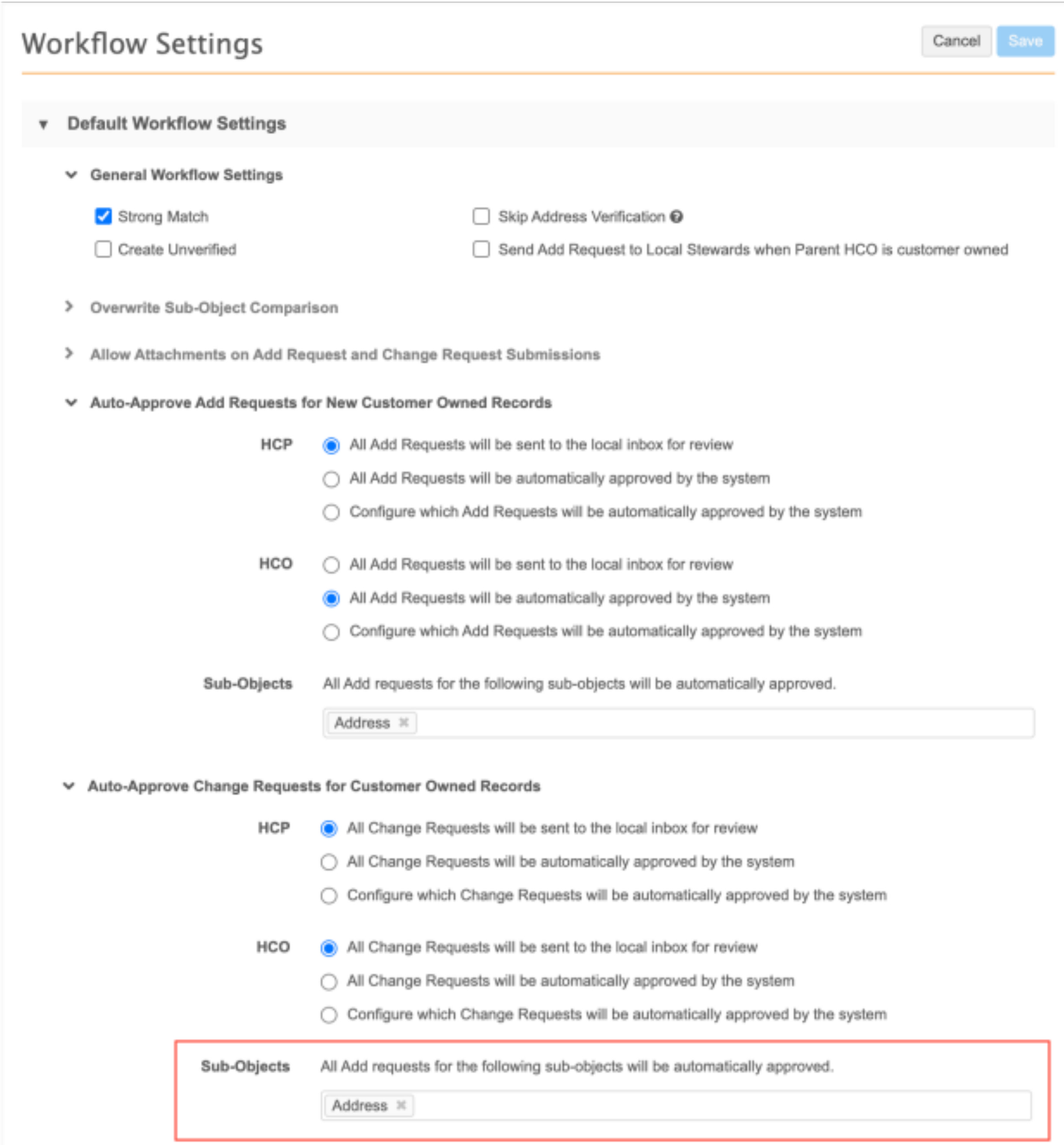
For example, a change to a locally managed address on an OpenData record can now be auto-approved.

#### *Supported sub-objects*

- Addresses
- Licenses
- Parent HCOs
- Custom sub-objects on HCPs and HCOs

#### *Set auto-approval for sub-object changes*

1. In the Admin console, click **Settings > Workflow Settings**.
2. Expand the **Auto-Approve Change Requests for Customer Owned Records** section.
3. In the **Sub-Objects** field, add the sub-objects that you want to be auto-approved.


Workflow Settings
Cancel
Save
Default Workflow Settings
General Workflow Settings
Strong Match
Skip Address Verification
Create Unverified
Send Add Request to Local Stewards when Parent HCO is customer owned
Overwrite Sub-Object Comparison
Allow Attachments on Add Request and Change Request Submissions
Auto-Approve Add Requests for New Customer Owned Records
HCP
All Add Requests will be sent to the local inbox for review
All Add Requests will be automatically approved by the system
Configure which Add Requests will be automatically approved by the system
HCO
All Add Requests will be sent to the local inbox for review
All Add Requests will be automatically approved by the system
Configure which Add Requests will be automatically approved by the system
Sub-Objects
All Add requests for the following sub-objects will be automatically approved.
Address
Auto-Approve Change Requests for Customer Owned Records
HCP
All Change Requests will be sent to the local inbox for review
All Change Requests will be automatically approved by the system
Configure which Change Requests will be automatically approved by the system
HCO
All Change Requests will be sent to the local inbox for review
All Change Requests will be automatically approved by the system
Configure which Change Requests will be automatically approved by the system
Sub-Objects
All Add requests for the following sub-objects will be automatically approved.
Address

## Vault CRM integration

### Vault CRM Bridge validation

25R2

Vault CRM Bridge configurations will be validated automatically each month to check for issues with existing mappings and find any possible missing mappings.

Mapping issues can cause errors when the bridge attempts to upsert data to CRM and when processing data change requests. Validating the bridge monthly can proactively find issues and help to reduce the risk of costly errors.

This enhancement is enabled by default in your Network instance for any enabled Vault CRM bridge configurations.

#### *Validation job schedule*

The **Validate Vault CRM Bridge** job will run on the first day of each month for all active Vault CRM Bridges, starting at midnight (12:00 AM) PST.

The schedule is automatically set; it is not visible in the Network UI.

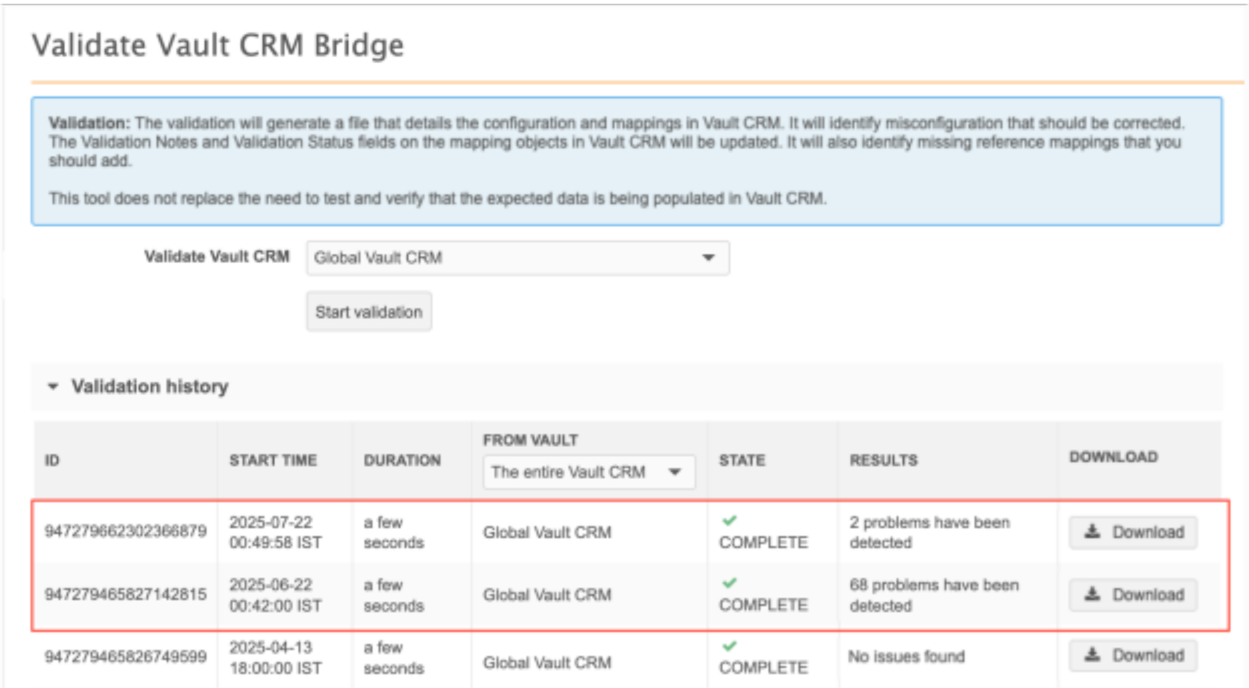
**Note:** You can continue to manually run the validation job at any time.

#### *View job results*

After the job runs at the beginning of each month, you can see if any issues were identified.

To view the job results:

1. In the Admin console, click **System Interfaces > Network Bridge**.
2. Click **Validate Vault CRM Bridge**.
3. The **Validation History** section displays all the jobs that have run and the results.




### *Addressing issues*

If issues were found, click **Download** to save the report. Use the report to identify and create any missing mappings.

1. Fix the issues.
2. Load the mappings into Vault CRM.
3. Click **Start Validation** to manually run the validation job to ensure that the bridge has no issues.

For more details about mappings, example issues, and loading the mappings into Vault CRM, see Validate the Vault CRM Bridge in the *Veeva Network Online Help*.

### Massachusetts Controlled Substances Registration (MCSR) license updates

25R1.1.2

Massachusetts has revised its medical sampling regulations. Now, a single Massachusetts Controlled Substance Registration (MCSR) license can cover all practice addresses for an HCP within the state. Previously, a separate license was required for each location.

To support the updated state guidance, the Network - CRM integration will add an HCP's MCSR license to their Massachusetts addresses that do not have a license.

This update makes it easier to sample more HCPs across Massachusetts while ensuring compliance with state guidelines.

For more details, see Veeva Connect: MCSR License Update and Network Enhancement.

#### *Supported integrations*

This change is applied to the Network bridge (data subscription) with Veeva CRM and Vault CRM.

Updates for Network Account Search and DCR Account Import will be supported in a future release.

#### *Enable this enhancement*

This enhancement is enabled by default in your Network instance.

#### *Multiple MCSR licenses*

If an HCP has multiple MCSR licenses, one of the licenses will be applied to their Massachusetts addresses without a license.

The MCSR license that is used will be determined using the following criteria (in order):

1. active license
2. license with the most Drug Schedules (to allow the most products to be covered)
3. license with the farthest expiration date

### Example

In this example, an HCP practices at four Massachusetts addresses. Only two of the addresses have MSCR licenses.

**Network Address**

| VID | Address Line 1 |
|---|---|
| 9000 | 100 Park Ave. |
| 9001 | 200 2nd St. |
| 9002 | 300 Third Dr. |
| 9003 | 400 Frost St. |

**Network License**

| License Number | Drug Schedule | Expiration Date | Address VID |
|---|---|---|---|
| MCSR100 | II, III, IV, V, VI | 6/30/2025 | 9000 |
| MCSR200 | VI | 12/31/2025 | 9001 |

<u>Current behavior</u>

When the Network bridge runs, the Network Address and License are mapped to the CRM Address. Only the two CRM Addresses are populated with their linked MCSR licenses.

**CRM Address - Current**

| Veeva Network ID | Address Line 1 | CDS License | CDS Drug Schedule | CDS Expiration Date |
|---|---|---|---|---|
| 9000 | 100 Park Ave. | MCSR100 | II, III, IV, V, VI | 6/30/2025 |
| 9001 | 200 2nd St. | MCSR200 | VI | 12/31/2025 |
| 9002 | 300 Third Dr. | | | |
| 9003 | 400 Frost St. | | | |

<u>New behavior</u>

Now, when the Network Bridge runs, the MCSR license that best fits the criteria is populated on the HCP's active Massachusetts addresses that do not have an MCSR license.

In this example, the active MCSR license with the most drug schedules is populated on the addresses that did not have an MCSR license.

**CRM Address - New**

| Veeva Network ID | Address Line 1 | CDS License | CDS Drug Schedule | CDS Expiration Date |
|---|---|---|---|---|
| 9000 | 100 Park Ave. | MCSR100 | II, III, IV, V, VI | 6/30/2025 |
| 9001 | 200 2nd St. | MCSR200 | VI | 12/31/2025 |
| 9002 | 300 Third Dr. | MCSR100 | II, III, IV, V, VI | 6/30/2025 |
| 9003 | 400 Frost St. | MCSR100 | II, III, IV, V, VI | 6/30/2025 |

## Data Launch Accelerator

25R1.1

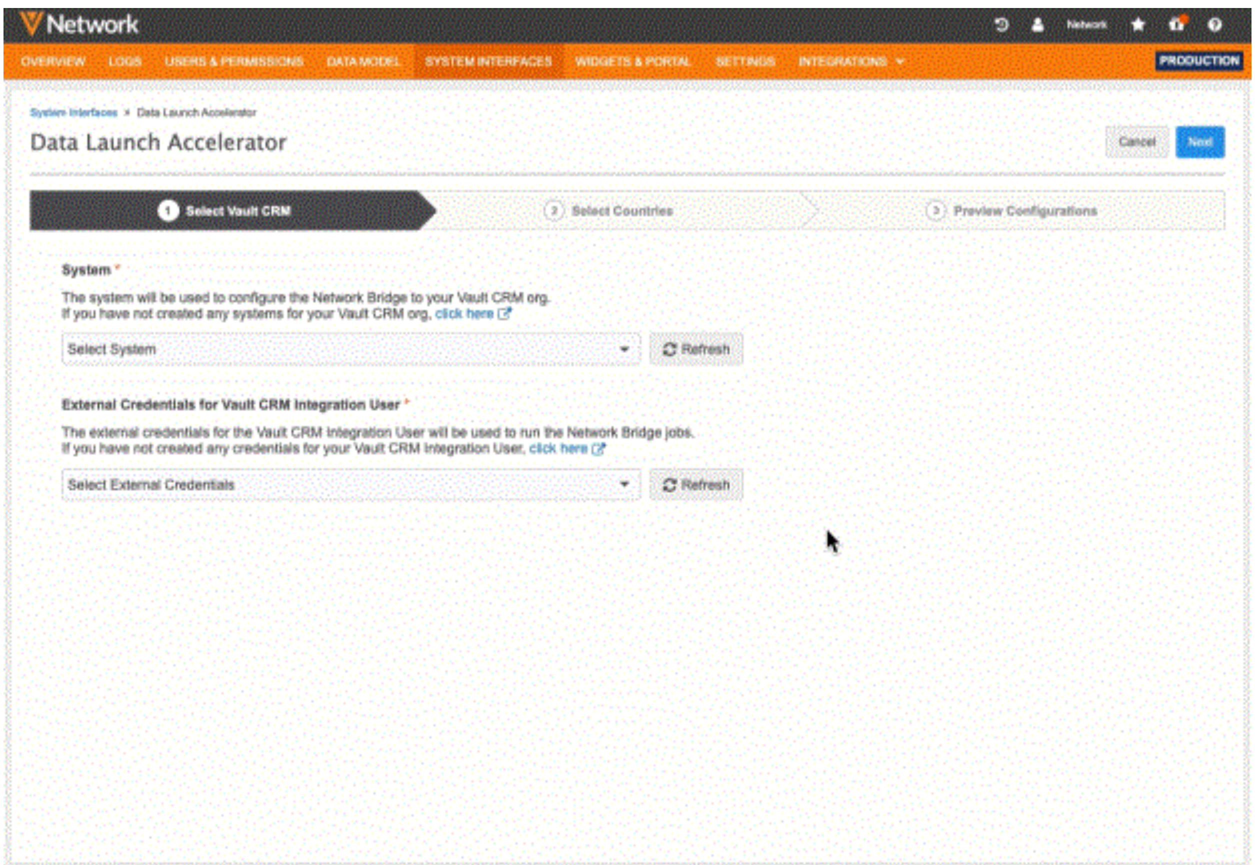
The Data Launch Accelerator helps you to quickly and easily set up the essential Network configurations for your Network - Vault CRM integration.

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.

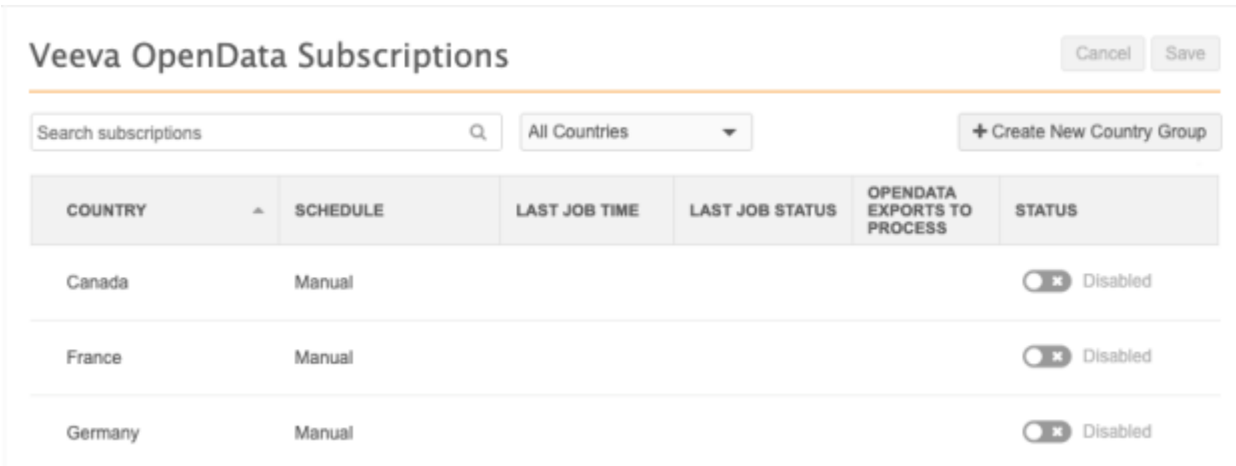


### *Prerequisites*

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.

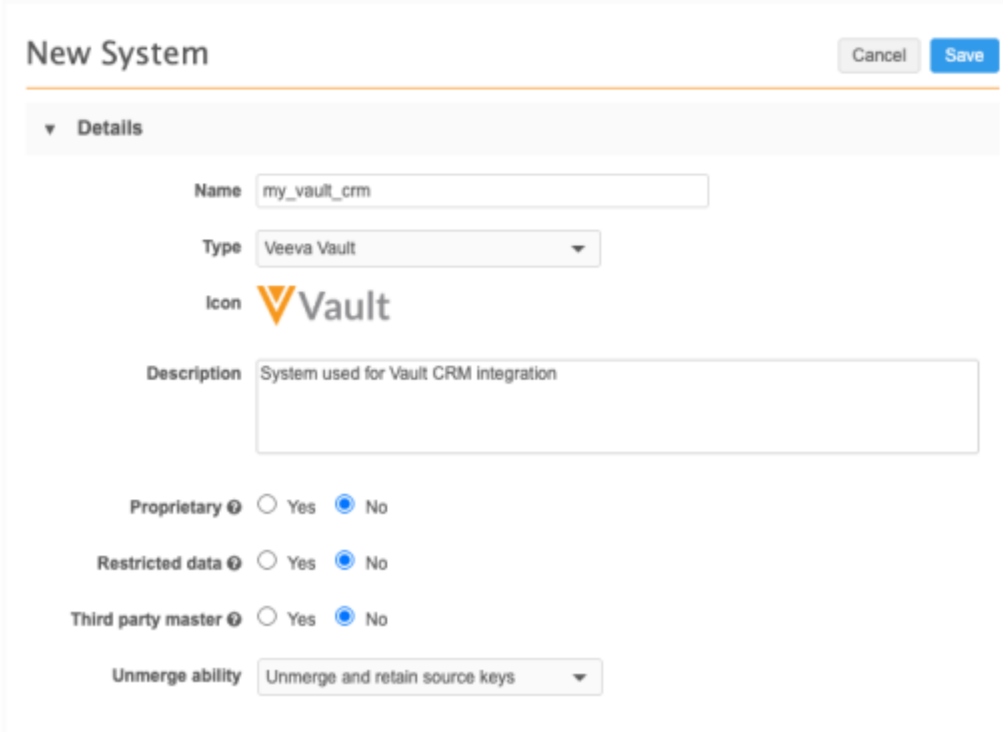
  Work with your Veeva Professional Services contact to create the working set.

#### 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**

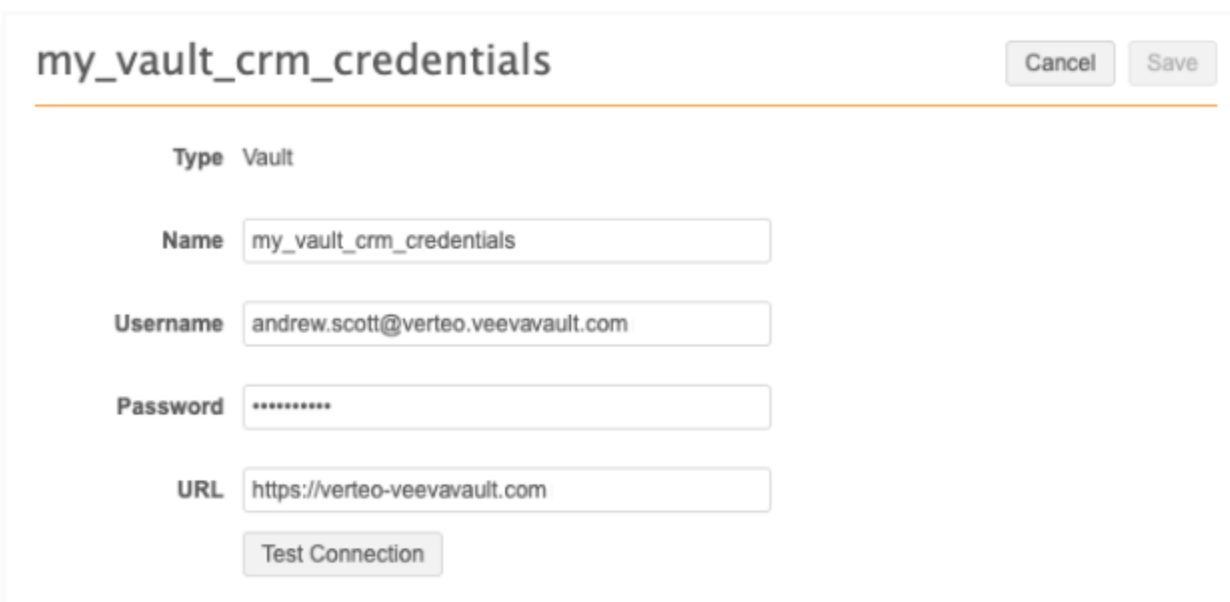



For details, see Adding Systems in the *Veeva Network Online Help*.

### 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**.



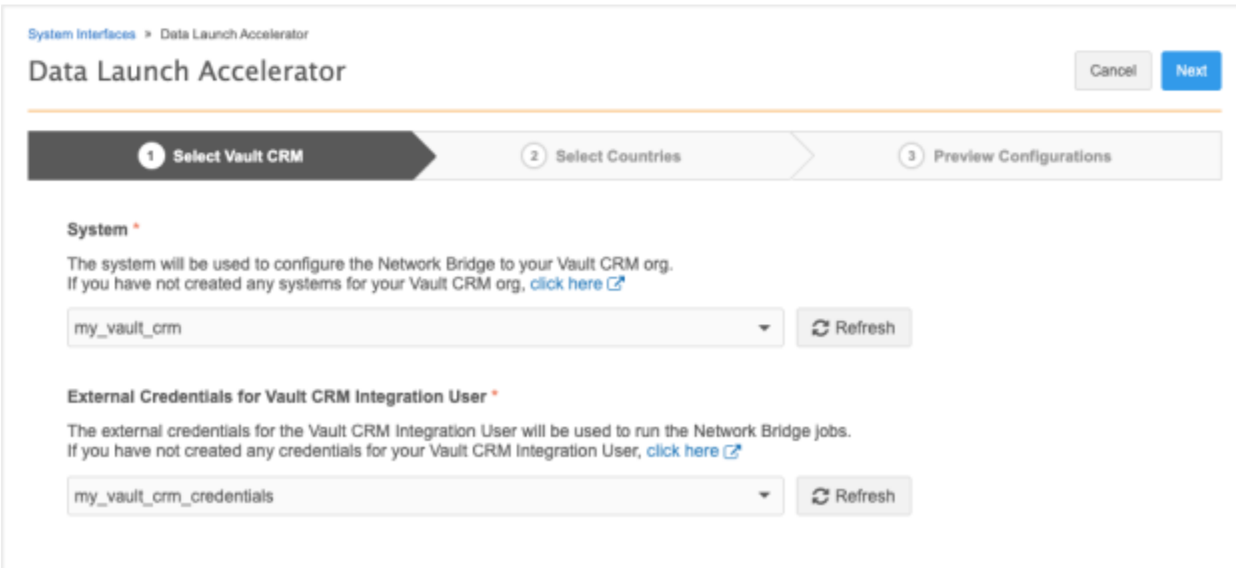
### *Run the Data Launch Accelerator*

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.

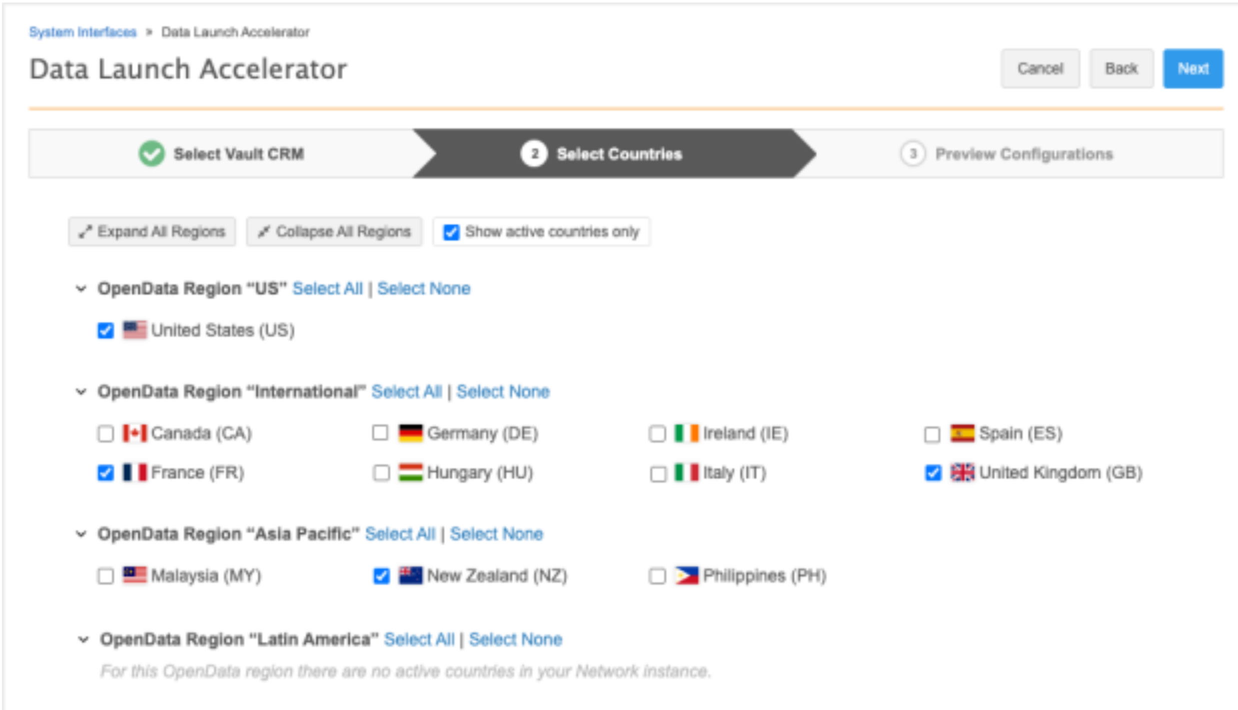
      The list displays all Vault credentials configured in your Network instance.




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

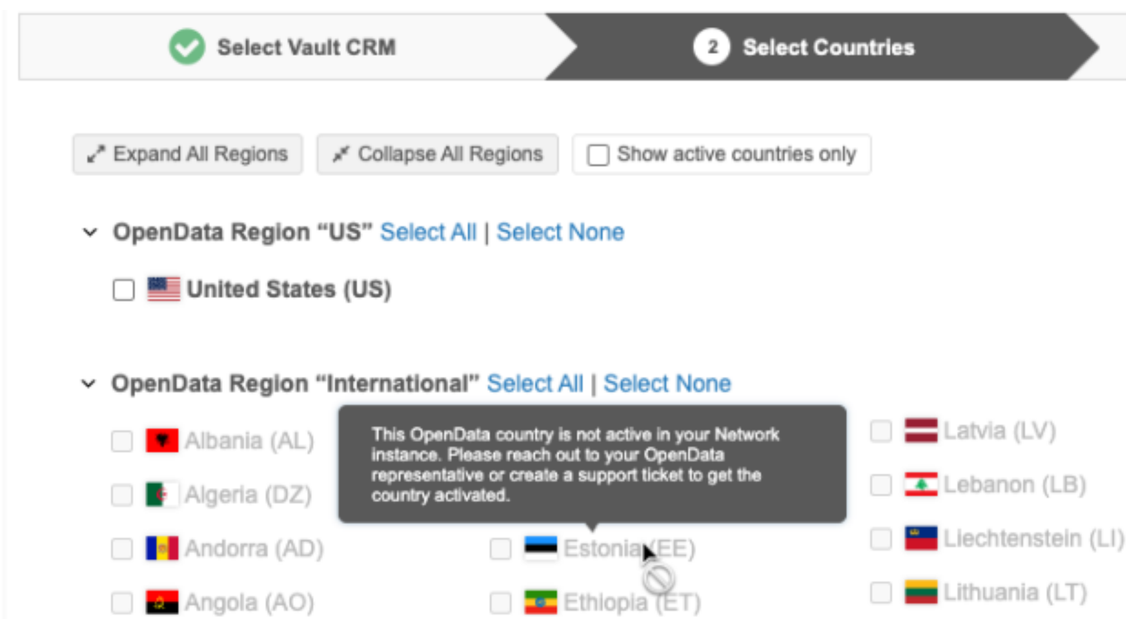



By default, only active countries display. These are countries that are ready to be enabled in your Network instance.

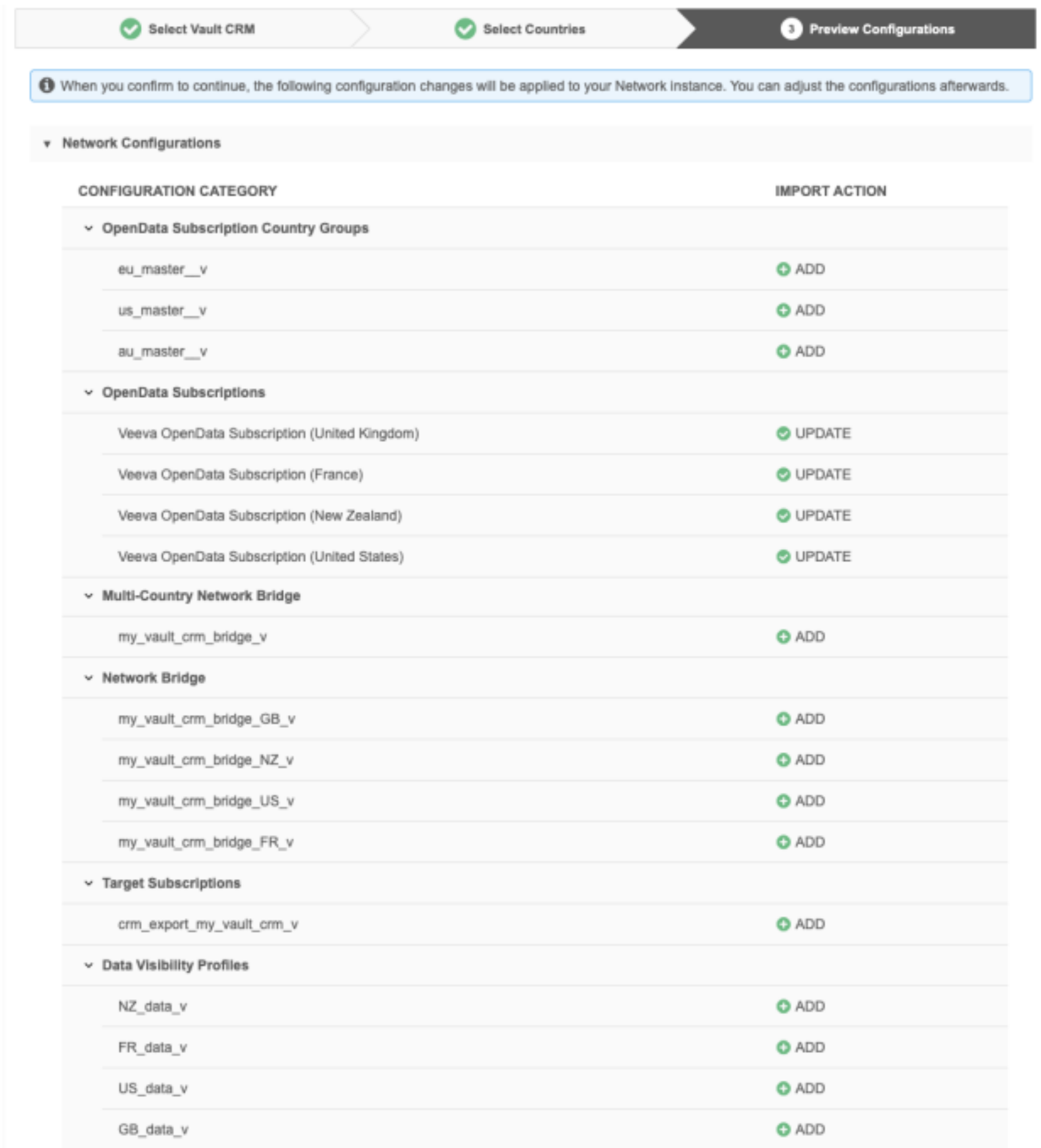
**View all countries**

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.



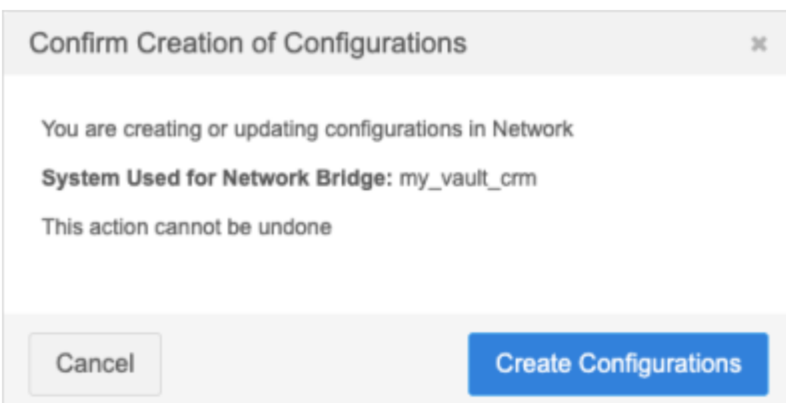
**Configurations**

For initial implementations, the **Import 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.

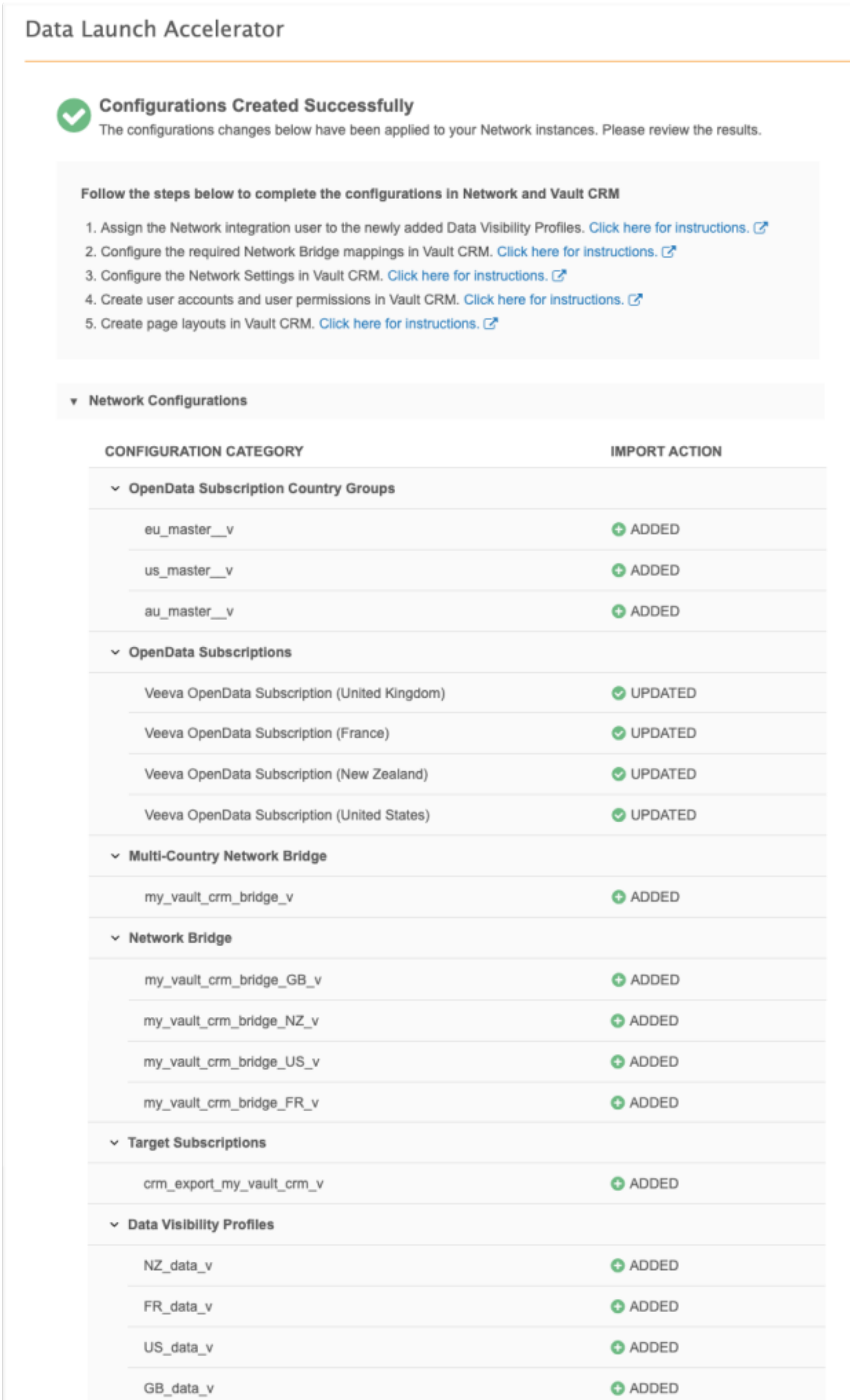



To confirm and proceed with the changes, click **Create Configurations**.

**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.

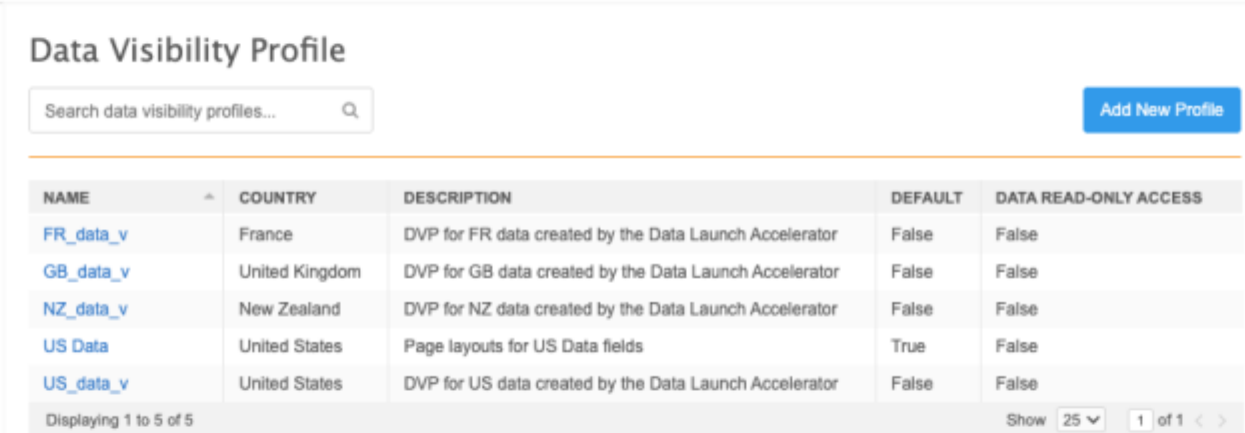
Additional steps to complete the process in Network and Vault CRM displays.




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.




#### 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**.<br>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 |
| **Profile Layout** | |

| Setting | Value |
|---|---|
| Health Care Professional<br>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 |

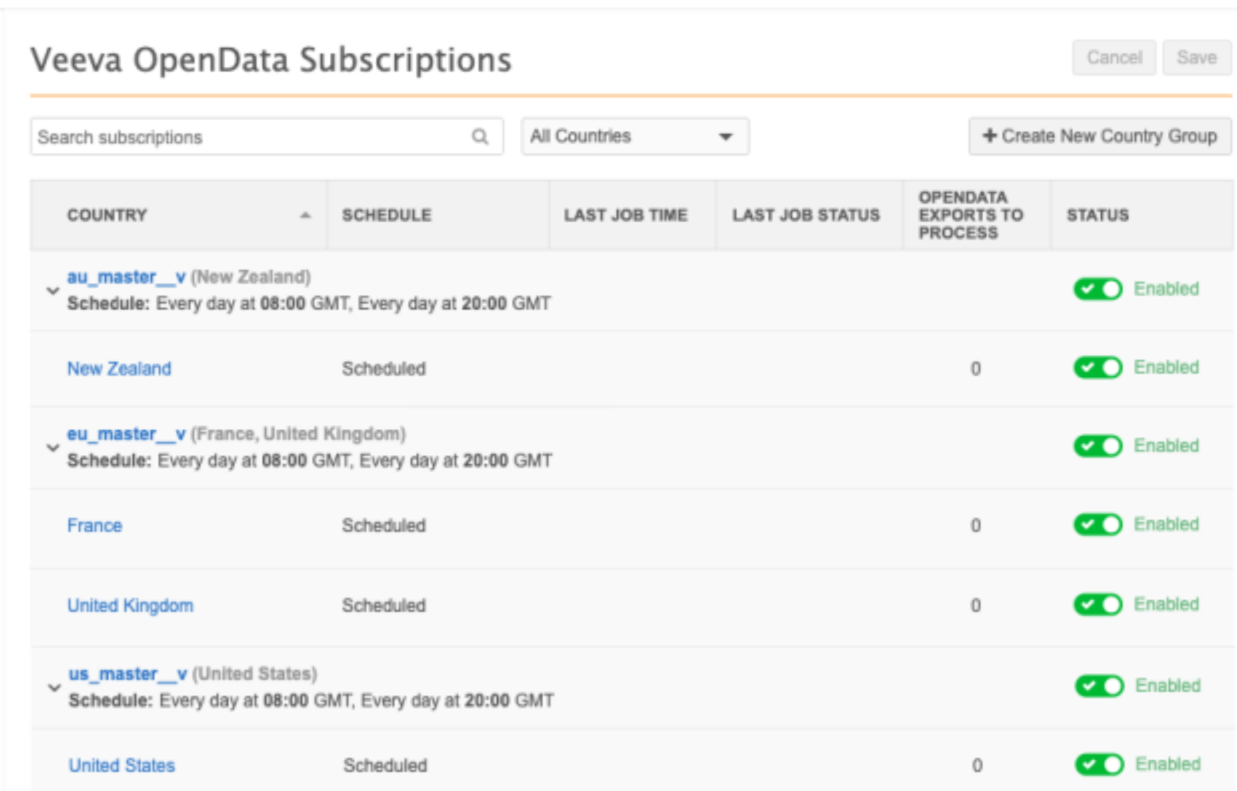
### Next step

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 customized after the wizard completes.

| Setting | Value |
|---|---|
| **Name** | The naming convention is **<OpenData_region_instance>__v**.<br>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:<br>• 08:00 (GMT)<br>• 20:00 (GMT)<br>The schedule applies to all countries in the group.<br>**Tip:** Open a country subscription to view the export times for that OpenData region and adjust the country group schedule to run soon after. |

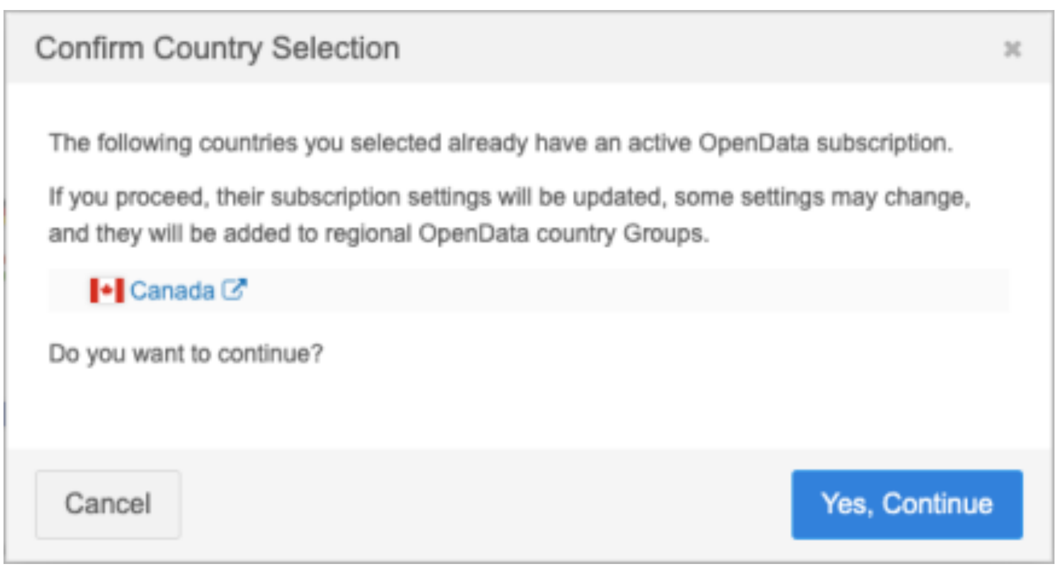
#### *OpenData country subscriptions*

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.<br>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

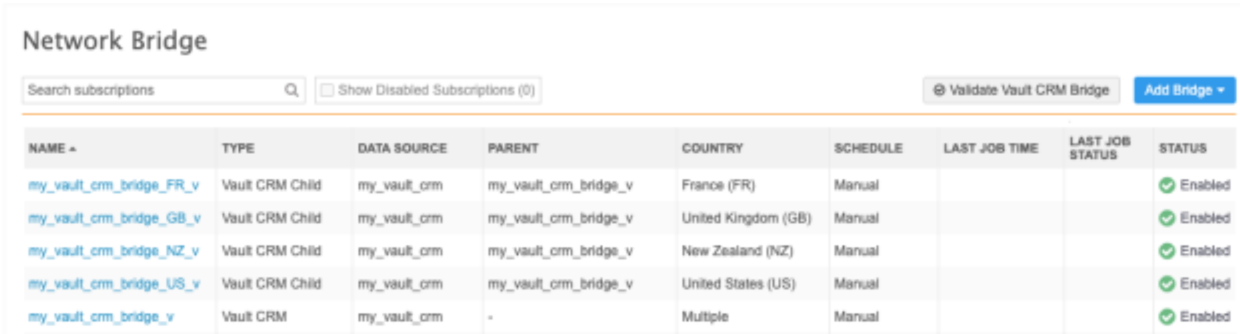
When the target subscription is created, the following settings are defined. These can be changed after the wizard completes.

| Setting | Value |
|---|---|
| **Details** | |
| Name | The naming convention is **crm_export_<*Vault_CRM_system_name*>_v**.<br>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<br>A filter is defined to export records only for the Vault CRM source system are exported.<br>**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.




#### Standard settings

| Setting | Value |
|---|---|
| **Details** | |
| Name | The naming convention is **<***Vault_CRM_system_name***>_bridge_v**.<br>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- Select Vault CRM** - Choose the source system and credentials for the existing Vault CRM integration.
- **2- Select Countries** - Choose the countries to add.
- **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.<br>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- Select Vault CRM** - Choose the system and credentials for a different Vault CRM org.
- **2- Select Countries** - Choose the countries to add for the Vault CRM integration.
- **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

25R1.1

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.

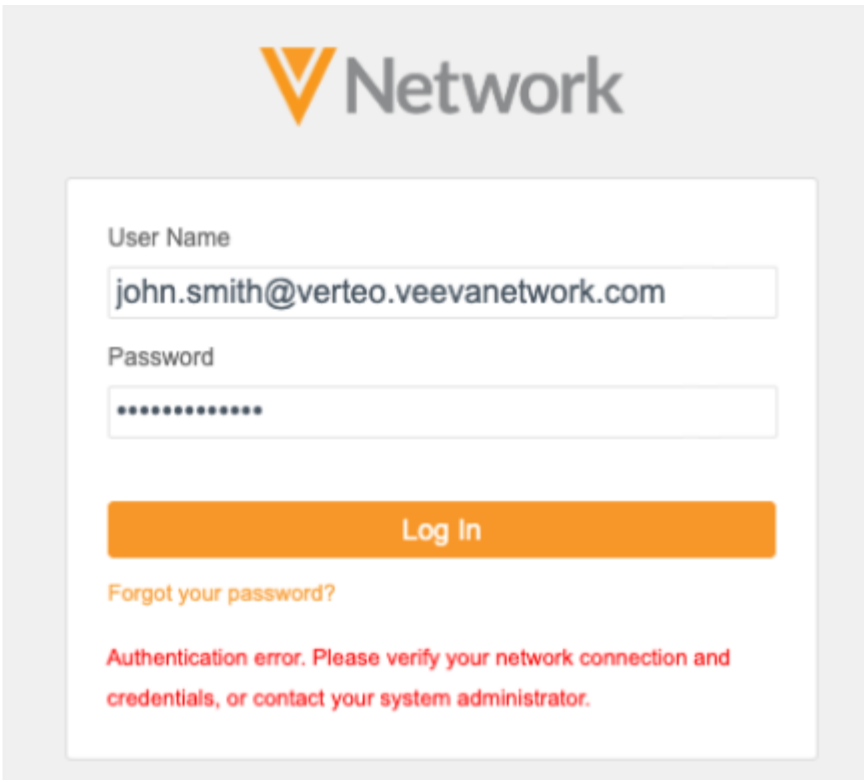
## Security

### IP ACCESS CONTROL

25R1.1

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

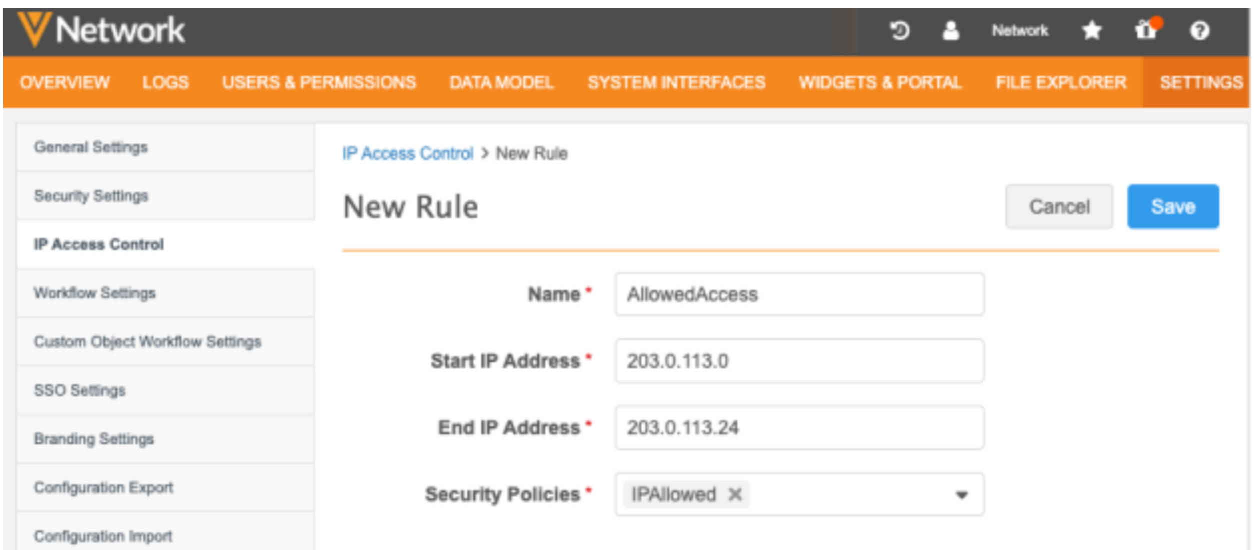
### *Prerequisites*

- **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**



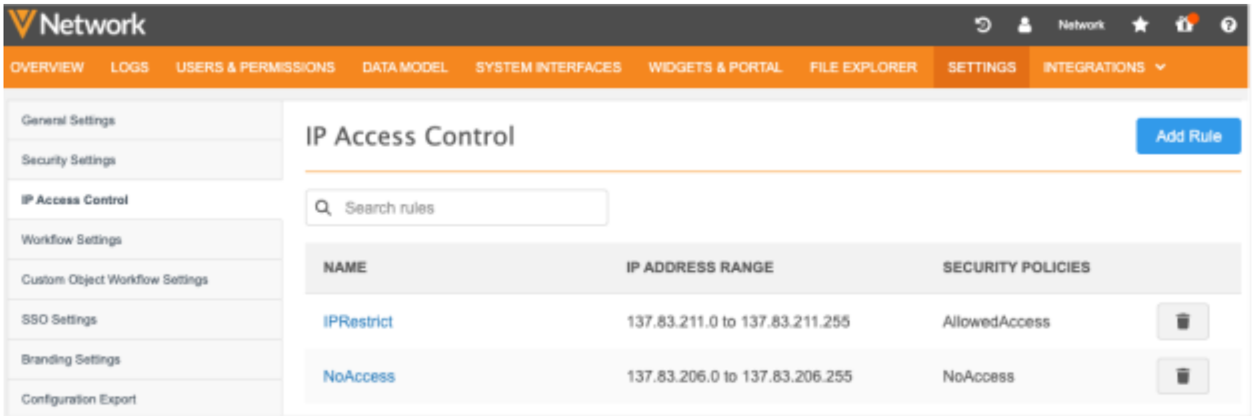

1. In the Admin console, click **Settings > IP Access Control**.
2. Click **Add Rule**.

   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.

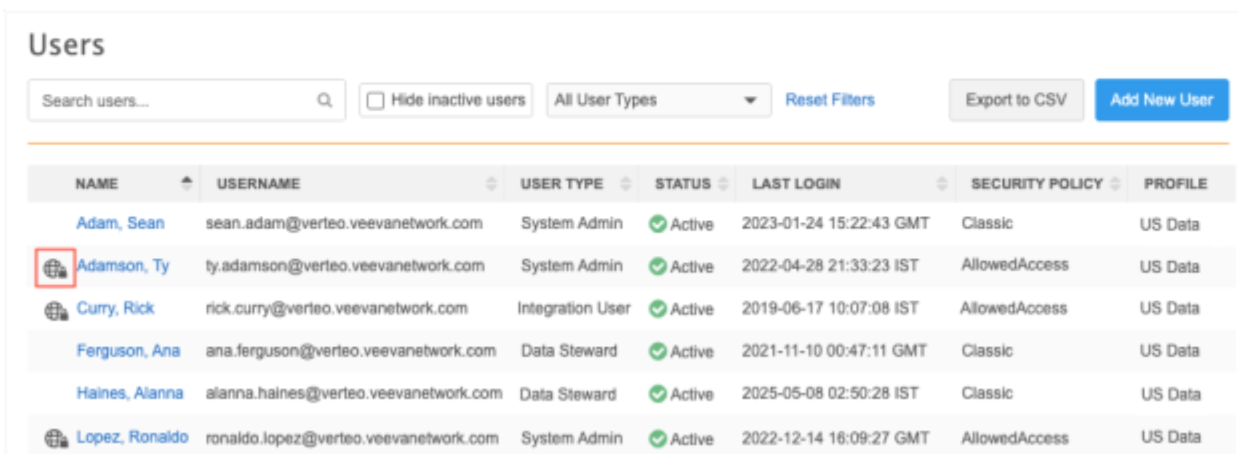
   **Note:** The rule is validated to ensure that the IPs are valid and that you are not creating a rule that locks you out of Network.

7. **Save** your changes.




### *User page updates*

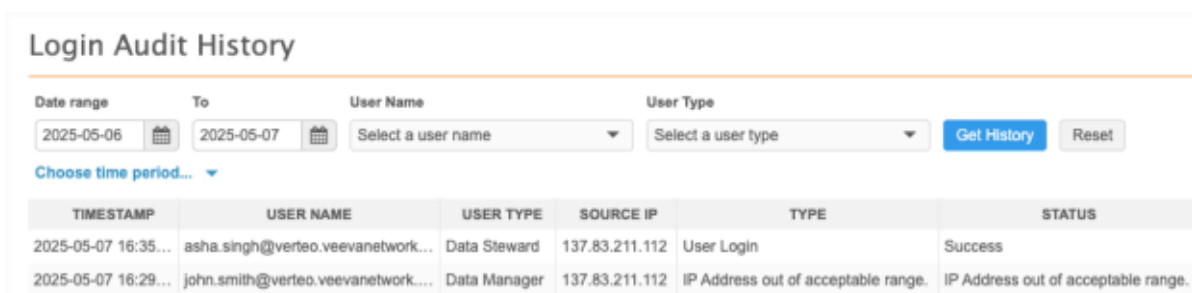
Administrators can quickly identify impacted users from the Users page (**Users & Permissions**). An icon displays beside the name of any user where IP access control rule is applied to their assigned security policy.




### *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.



# API

## Version Update

25R2

The Network API is updated to v36.0.

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 v35.0 until there is a change for v36.0 that they want to apply.

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