



 **veeva** Network

Veeva Network 25R3.0 Release Notes

November 2025



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About these Release Notes

These Release Notes describe all features that will be included in Veeva Network 25R3.0.

RELEASE DATES

- **Sandbox release** (version 25R3.0) - Friday, November 28
- **Production release** (version 25R3.0.1) - Friday, December 12

SUBSCRIBE TO RELEASE NOTIFICATIONS

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

Software releases and maintenance

- [Veeva Trust Site](#)

At the top of the page, click **Subscribe to Veeva Trust Site** and subscribe to the Veeva Network component.

Release Notes and Data Governance documents

The documents are posted in the following locations:

- Veeva Connect - Join the [Network Community](#).

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

- [Veeva 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 enhancement has been added since the Early Release Notes were published.

- **Hierarchy Explorer widget: Tabs for HCOs and HCPs** - Users can now save popular filters as dedicated tabs, providing quick access to specific HCO and HCP data.

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 25R3.0 major release.

			ST	DS	DM	AD
Network Widgets						
Multivalued fields	Reference fields containing multiple values are supported for the Search widget and Hierarchy Explorer.	25R2.1	●	●	●	●
Hierarchy Explorer widget						
Tabs for HCOs and HCPs	Save popular filters as dedicated tabs for quick access to HCO and HCP data (for example, a Hospitals tab).	25R3.0	●	●	●	●
Search widget integration	Administrators can include a Search widget in Hierarchy Explorer, so users can search for and add affiliations from Veeva OpenData.	25R3.0	●	●	●	●
Add HCPs to parent HCOs	Widget users can now extend hierarchies by adding HCPs to parent HCOs in the widget.	25R3.0	●	●	●	●
Feature message	A message displays if the Hierarchy Explorer widget is not enabled for your instance.	25R2.1	●	●	●	●
Create tabs	Users can create tabs on the homepage to organize hierarchy data into relevant categories.	25R2.1	●	●	●	●
Edit hierarchies	Business users can now manage affiliations directly within the widget.	25R2.1	●	●	●	●
Edit account profiles	Business users can make changes to accounts within the widget.	25R2.1	●	●	●	●
Include relationship details	Relationship fields can be added to HCO and HCP account details.	25R2.1	●	●	●	●
Data change requests						
DCR Approval Rules	Approval rules can now be applied to suspect match tasks.	25R2.1	●	●	●	●



			ST	DS	DM	AD
Reports						
Job Impact Dashboard enhancements	Users can filter queries based on country. Additionally, files downloaded from Network tables now have more descriptive names.	25R3.0	●	●	●	●
Custom tables	Reporting users can now update custom tables in the SQL Query Editor.	25R3.0	●	●	●	●
Test queries in the Job Impact Dashboard	Queries can be tested on dashboard tiles to ensure they contain the desired result.	25R2.1	●	●	●	●
Data Model						
CDA data model	Field mapping update for the National Healthcare ID field for HCPs	25R3.0			●	●
Cluster management	Cluster codes are now available for Hungary, and updated codes are available for the Netherlands.	25R3.0			●	●
CDA data model	The Veeva ID (veevaid__v) field is now enabled by default in all Network instances.	25R2.1	●	●	●	●
Cluster management	Updated cluster codes are available for Germany.	25R2.1			●	●
Match						
Add request match rules	The default match rules for countries in Latin America are updated to reduce the potential for over matching for HCPs and HCOs.	25R3.0			●	●
Match summary	The Match Summary section for job details now contain match statistics as percentages (%).	25R2.1			●	●
Network Expressions (NEX)						
ABS() function	Returns the absolute value of a number.	25R2.1			●	●
AT() function	Retrieves an element in a comma separated list of values.	25R2.1			●	●
CEIL() function	Rounds a number up to the nearest whole number.	25R2.1			●	●
FLOOR() function	Rounds a number down to the nearest whole number.	25R2.1			●	●
ROUND() function	Changes a number to the closest whole number.	25R2.1			●	●
Target subscriptions						
Header row on empty files	Header rows can now be included on files that are exported with no data.	25R2.1			●	●



			ST	DS	DM	AD
Vault CRM integration						
Bridge validation enhancements	The Validate Vault CRM Bridge jobs includes additional checks for mappings plus configuration issues.	25R3.0			●	●
Vault CRM Bridge	The job details for the Bridge now contain counts for records that were upserted but were unchanged.	25R2.1			●	●
Logs						
Searches from China CRM	Administrators can identify searches originating from China CRM from the Search Audit History.	25R2.1				●
Security						
SSL certificates	Customers who explicitly download and install certificates must update the certificate for veevanetwork.com.	25R2.1				●
API						
Version update	The Network API is updated to v37.0.	25R3.0				Developers

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

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



Network widgets

MULTIVALUED REFERENCE FIELDS

Reference fields containing multiple values are supported for Hierarchy Explorer and the Search widget.

These enhancements are enabled by default.

For information about these fields, see [Multivalued reference fields](#) in the *Veeva Network Online Help*.

Hierarchy Explorer widget

Multivalued field display on HCP and HCO accounts in the hierarchy. They can also be used to filter the hierarchy to find specific accounts.

Prerequisite

To use multivalued fields in Hierarchy Explorer, they must be added to the Hierarchy Index file. Contact Veeva Support to add the fields.

The screenshot displays the Veeva Network Hierarchy Explorer interface for Mayo Clinic. At the top, the Mayo Clinic logo and address are shown. Below this, a filter bar contains a button labeled "All Specialties (CDA): Cardiology" with a red box around it, and an "Apply Filter" button. The main content area shows a list of Health Care Professionals. The first entry is Daniel Kind, a Prescriber. A table with two columns, "MVR Therapeutic area" and "All Specialties (CDA)", is highlighted with a red box. The "MVR Therapeutic area" column lists "Neurology, Oncology", and the "All Specialties (CDA)" column lists "Cardiology, Internal Medicine".

Health Care Professionals	HCP Type	MVR Therapeutic area	All Specialties (CDA)
<input type="checkbox"/> Daniel Kind #md #npi #physician #primarycare Mayo Clinic Eau Claire 1400 Bellinger St Eau Claire WI 54703	Prescriber	Neurology, Oncology	Cardiology, Internal Medicine



Search widget

Multivalued fields are supported in the Advanced search form, as filters, and they display on account profiles.

Advanced Search form

Widget users can use the fields to search for HCP and HCO accounts.

The screenshot displays the 'Search Accounts' widget interface. It features two tabs: 'Health Care Professionals' (active) and 'Health Care Organizations'. The 'NAME' section includes input fields for 'First Name', 'Last Name', 'ID', and 'Parent Corporate Name'. Below these are links for 'IDs Available to Search' and a 'Hashtags' field. The 'LOCATION' section includes 'City' and 'Zip/Postal Code' fields. A red box highlights the 'MVR Therapeutic area' dropdown menu, which is open, showing a search bar and a list of options: Cardiology, Neurology, and Oncology. At the bottom right, there are 'Clear All Filters' and 'Search' buttons.

Note: Administrators must add the field to the **Advanced Search Field Selection** in the widget configuration. For details, see [Configure a search widget](#) in the *Veeva Network Online Help*.



Filter on fields

The search results can be filtered using a multivalued field.

Search Accounts

[← Back to Search](#)

2 Search Results for Health Care Professionals [+ Create New](#)

FILTERS: Country: United States ✕ MVR Therapeutic area: Oncology ✕

[Clear All Filters](#) [Apply Filters](#)

Displaying 1 - 2 of 2 Results Show 20 < 1 / 1 >

Parent Corporate Name

Hashtags

MVR Therapeutic area

Oncology

Search

Neurology

Cardiology

Maria Lopez

#accupunc #cda #md #physician

Prescriber | Ophthalmology | Doctor of Medicine

3916 Prince St Ste M51 Flushing NY 11354-5368

Cooper Ma

#cda #md #physician

Prescriber | Cardiovascular Disease | Doctor of Medicine

Mayo Clinic Health System Eau Claire 1400 Bellinger St Fl 2 Eau Claire WI 54703

View account profiles

Multivalued fields display on account profiles in the widget.

Search Accounts

[← Back to Search Results](#)

Cooper Ma

#cda #md #physician

Prescriber, Cardiovascular Disease

Mayo Clinic Health System Eau Claire 1400 Bellinger St Fl 2 Eau Claire WI 54703

CoooperMa@YAHOO.COM

7158385222

Profile Information

Primary Information [Edit](#)

Name VID

Cooper Ma 243230465085932545

HCP Type * Gender

Prescriber Male

All Specialties (CDA) MVR Therapeutic area

Cardiology Internal Medicine

Neurology Oncology

The fields cannot be edited on account profiles.



API support

Integration users can view labels for multivalued fields when the Enriched Results flag is used in the Search and Retrieve Entity API.

Example

Multiple labels display for the All Specialties CDA field.

```
"all_spec_cda__v": "cd,im",  
  "all_spec_cda__v_value__u": [  
    "Cardiology",  
    "Internal Medicine"  
  ]
```

This is supported for Network API version 36.0.

For details about the Enriched Results flag, see the [Search widget](#) topic in the *Veeva Network Developer Help*.



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.

Tabs for HCOs and HCPs

25R3

Widget users can create tabs to organize HCOs and HCPs on key networks. This enables users to see the segments of data without filtering the hierarchy each time they visit the widget. For example, you can create tabs to organize hospitals, 340B Accounts, Records with Sales Tied to it, and oncologists.

Health Care Organization		Level	Roll-Ups		HCO Type	Major Cl
<input type="checkbox"/>	Anmed Health Cannon <small>#hospital #npi</small> <small>123 W G Acker Dr Pickens SC 29671-2739</small>	Level 2	HCO DIRECT: 7 TOTAL: 7	HCP DIRECT: 57 TOTAL: 57	Organization, Hospital	Hospitals
<input type="checkbox"/>	Anmed Health Medical Center <small>#hospital #npi #VCRM</small> <small>800 N Fant St Anderson SC 29621-5708</small>	Level 2	HCO DIRECT: 5 TOTAL: 5	HCP DIRECT: 603 TOTAL: 605	Organization, CMS Teaching Hospital	Hospitals

This enhancement is enabled by default.

About tabs

The following system tabs always display for a health system:

- Child HCOs
- Ancestor HCOs
- Child HCPs
- Summary View

Users can now create their own tabs and access any shared tabs created by a widget admin.

Important: Tabs are applied to all hierarchies and health systems in the widget. They display if they are relevant to the country of the root HCO.



Supported users

All Network users can create tabs in the widget.

User Type	Create Private Tab	Create Public Tab
Portal User		
Standard User		
Data Steward		
Data Manager		
System Administrator		
System and Data Admin		

Tab list

If the hierarchy contains many tabs, you can scroll through the tabs.

To quickly open a tab, click the **Menu** icon to display a list of all tabs for the health system. The tab that is currently open is highlighted in bold font and displays a **Checkmark** beside the tab name.

Click a tab to open it.

The screenshot shows the Atrium Health interface. At the top, there's a header with the Atrium Health logo and address: 1000 Blythe Blvd Charlotte NC 28203-5812. Below the header, there are tabs for different hierarchies: All Hierarchies (selected), Ownership Hierarchy, Oncology Hierarchy, Pulmonary Hierarchy, and Neurology Hierarchy. An 'Apply Filter' button is also present.

Below the hierarchy tabs, there's a section for 'Hospitals (27)' and 'Teaching Hospitals (8)'. A 'Menu' icon (three horizontal lines) is highlighted with a red box. Clicking this icon opens a dropdown menu with the following items:

- Hospitals (Total 27)**
- Teaching Hospitals (Total 8)
- dept (Direct 6 | Total 71)
- Child HCOs (Direct 877 | Total 1501)
- Summary View
- Neurologists (Direct 88 | Total 295)
- Child HCPs (Direct 1857 | Total 11980)
- Oncologists (Direct 60 | Total 292)
- Ancestor HCOs

The main content area shows a table with columns: Level, Roll-Ups, and HCO Type. The Roll-Ups column is further divided into HCO and HCP, each with Direct and Total counts.

Level	Roll-Ups				HCO Type
	HCO		HCP		
	DIRECT	TOTAL	DIRECT	TOTAL	
Level 2	7	7	57	57	Organization, I
Level 2	5	5	603	605	Organization, I
Level 2	-	-	8	8	Organization, I



Create a tab

1. On the key network, click **Actions > Add Tab**.

Choose **HCO Tab** or **HCP Tab**.

New Tab

Details

Filters

Name

Depts

Icon

Department

Roll-Up Counts

☐ Direct and Total Roll-Ups
Recommended for HCPs

☒ Single Count of Records that Match Filters
Recommended for HCOs

Countries

☒ All Countries

☐ Specific Countries

Available To

☒ Just Me

☐ All Users

Preview

Depts

Applied Filters

No filters applied.
Go to "Filters" tab on the left to start adding filters to this tab

Cancel Save

2. On the **New Tab** dialog, define a meaningful **Name**. The name will display to all users that can access the tab.

Names can contain a maximum of 25 characters.

3. **Icon** - Expand the list and choose an appropriate icon.
4. **Roll-Up Counts** - Define the counts to display for the tab.
 - **Direct and Total Roll-Ups** - Recommended for HCPs.
 - **Single Count of Records that Match Filters** - Recommended for HCOs.
6. **Countries** - Define the countries for the tab. Users can access the tab if they have a data visibility profile for that country.
 - **All Countries**
 - **Specific Countries** - Select the countries.

The list displays countries that are defined for the widget and that you have access to through your data visibility profiles.



7. **Available to me** - Define who can access the tab.
 - **Just Me** - The tab is private. No other users can access the tab.
 - **All Users** - The tab is public. All widget users can access the tab.

Displays only for Administrators and Data Managers.

8. Click **Filters** - Define the field and value to use to segment the accounts.

Filters are limited to the fields in the Hierarchy Index file. HCO fields and Address fields are supported.

The screenshot shows the 'New Tab' dialog box with a dark header bar containing a close button (X). Below the header, there are two tabs: 'Details' (selected) and 'Filters'. The 'Filters' tab is active, showing a sidebar with 'HCO Filters' and 'HCP Filters' sections. The 'HCO Filters' section includes a radio button for 'Hierarchy Filter' (selected) and a radio button for 'Filter Every Level'. Below this are several filter fields: 'Corporate Name' (text input), 'HCO Type' (dropdown), 'State' (dropdown), 'City' (text input), 'Major Class of Trade' (dropdown), 'HCO Specialty' (dropdown), 'VID' (text input), and 'HCO Hashtags' (text input with a yellow highlight and a blue '#dept' tag). The 'HCP Filters' section includes a link 'Clear All HCP Filters' and several filter fields: 'HCP Type' (dropdown), 'HCP Specialty' (dropdown), 'HCP Medical Degree' (dropdown), 'VID' (text input), 'Relationship Type' (dropdown), 'HCP Hashtags' (text input), and 'Min Roll Up' (text input). At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

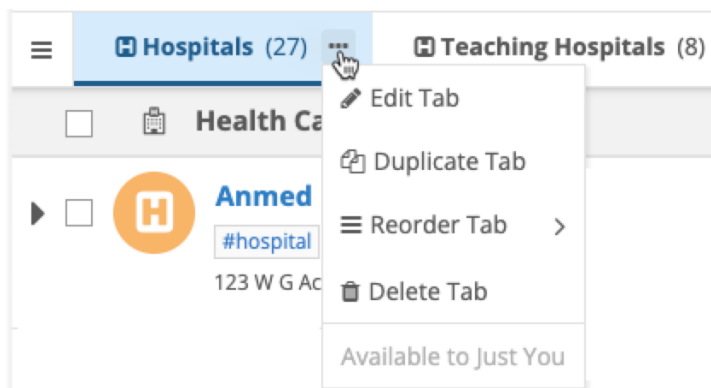
9. **Save** your changes.

The tab displays on the health system's hierarchy and contains the records defined by the filters. The count of records displays beside the tab name.



Manage tabs

Hover over the tab name and click the **More (...)** icon to open the tab options.



Available actions

The actions that display depend on the type of tab (public or private) and your user type.

Some actions are also available for system tabs.

Action	Description	Key Details
Edit tab	Edit any of the details on the tab.	<ul style="list-style-type: none">Private tabs can be promoted to public tabs only by the tab creator.Public tabs can be demoted to private only by the tab creator.Standard users cannot edit public tabs.
Duplicate tab	Make a clone of the tab to include all of the copied settings.	<ul style="list-style-type: none">Supported for the Child HCOs and Child HCPs system tabs also.
Reorder tab	Move the tab to a different position. <ul style="list-style-type: none">- Move Right- Move Left- Move First- Move Last Tip: You can drag and drop a tab to any position.	<ul style="list-style-type: none">New tabs display immediately after the Add Tab button.Reordering tabs does not impact other users. The order is specific to each user.Supported for all system tabs.
Delete tab	Remove the tab from the widget.	

A message at the bottom of the menu identifies if the tab is private (**Available to just you**) or public (**Available to Everyone**).



Export data

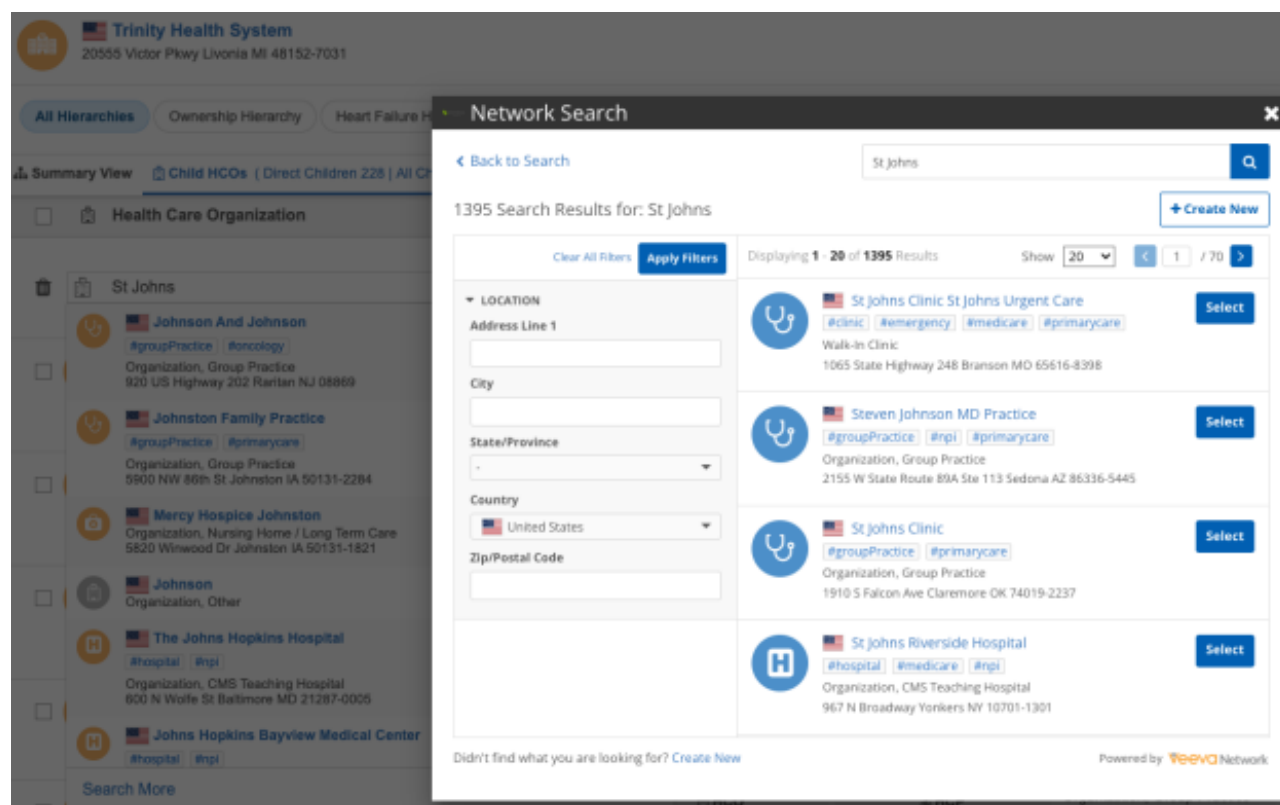
Click **Export to Excel** to download a file containing only the data on the current tab.

The file is exported with the following naming convention: *<tab name> in <health system name> <date and time>.xlsx*. For example, Hospitals in Atrium Health 2025-11-11T21_23_35.xlsx.

SEARCH WIDGET INTEGRATION

25R3

Administrators can include a Search widget in Hierarchy Explorer, so users can search for affiliations in Veeva OpenData and submit add requests for new HCOs and HCPs. Previously, affiliations could be added only from your Network instance.



This enhancement is available by default. Administrators can define the Search widget to access in the Hierarchy Explorer widget configuration.



Add a Search widget to Hierarchy Explorer

Administrators can define a Search widget that users can access from the Hierarchy Explorer widget.

If you do not have an existing Search widget, see the [Search widget](#) topics in the *Veeva Network Online Help*.

To add the Search widget:

1. In the Admin console, click **Widget & Portal** and open a Hierarchy Explorer widget configuration.
2. In the **Quick Links** panel, click **Editing Options** to scroll to that section in the configuration.
3. Select **Enable Editing** so users can manage hierarchies in the widget.
4. Expand the **Search Widget** list and select the widget users can access within the Hierarchy Explorer widget.
5. Optionally add a **Preset Search Filter**. For example, to ensure that only active HCOs can be added as affiliations, define the following filter: `hco.hco_status__v=A`. When users access the Search widget from Hierarchy Explorer, the results will display active HCOs only.
6. **Save** your changes.

The screenshot shows the 'Editing Options' section of a configuration interface. It includes a checkbox for 'Enable Editing' which is checked. Below this is the 'SEARCH WIDGET' section with a descriptive text: 'Choose the search widget to use for adding accounts. Optionally, define a preset filter to refine the search results (for example, display active records only)'. There are two input fields: 'Search Widget' with a dropdown menu showing 'SearchWidget', and 'Preset Search Filter' with a text input containing 'hco.hco_status__v=A'.

Find an affiliation in the Search widget

Hierarchy Explorer users can access the Search widget if they can't find the affiliation in the Hierarchy Explorer search results.

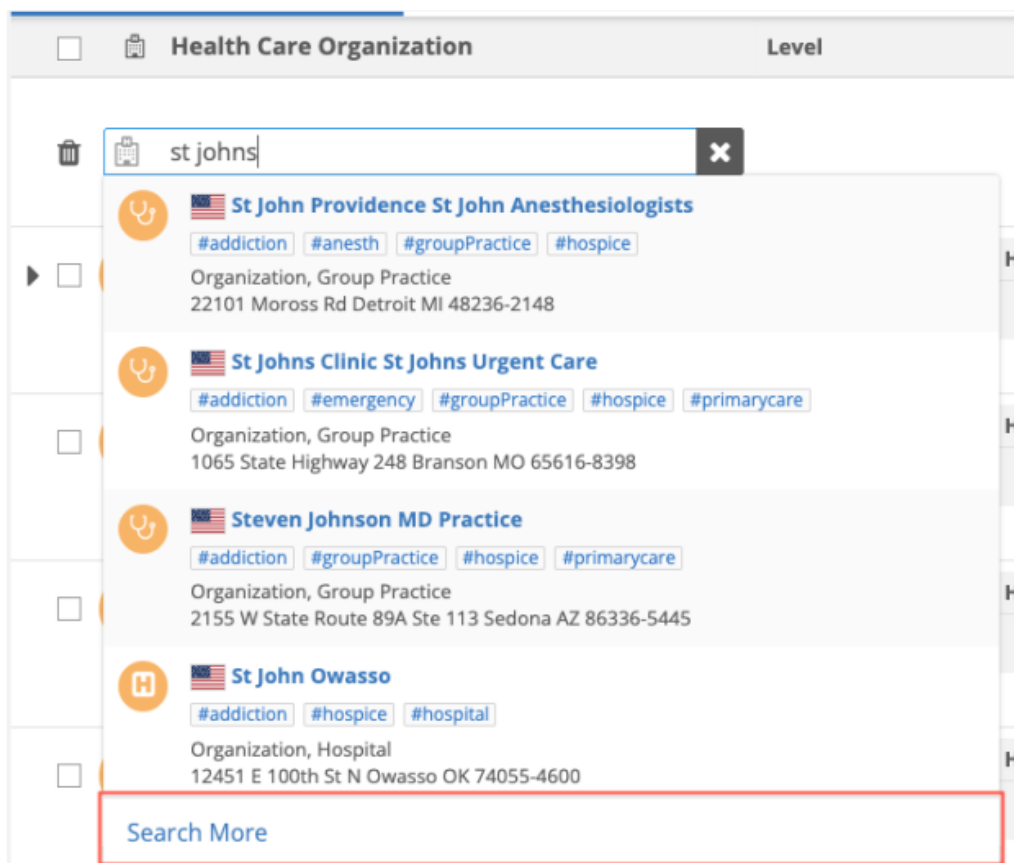
The Hierarchy Explorer search results display accounts in their Network instance only. The Search widget displays accounts in their Network instance and accounts that have not yet been downloaded from Veeva OpenData.

To add an affiliation using the search widget:

1. In Hierarchy Explorer, open a health system.
2. Add an affiliation in one of the following ways:
 - **Top level affiliation** - Click **Add Affiliation**.
 - **Child HCO** - On the **Child HCOs** tab, beside an HCO, click **Actions > Add Child HCO**.
 - **Parent Affiliation** - On the **Child HCPs** tab, beside an HCP, click **Actions > Add Parent Affiliation**.



3. In the row that displays, type a keyword to the search bar.
4. If the account you are looking for cannot be found, click **Search More** at the bottom of the search results.



5. The Search widget opens and displays the search results for your keywords. Only results for the object type (HCO or HCP) you are adding display.



Search Accounts

[Back to Search](#)

1427 Search Results for: st johns [+ Create New](#)

[Clear All Filters](#) [Apply Filters](#) Displaying 1 - 20 of 1427 Results Show 20 < 1 / 72 >

NAME

Corporate Name

Hashtags

LOCATION

Address Line 1

City

State/Province

Country

Zip/Postal Code

St Johns Clinic St Johns Urgent Care [Add](#)

[#donotcontact](#) [#groupPractice](#) [#medicare](#) [#nottarget](#)

Organization, Group Practice

1065 State Highway 248 Branson MO 65616-8398

Steven Johnson MD Practice [Add](#)

[#groupPractice](#)

Organization, Group Practice

2155 W State Route 89A Ste 113 Sedona AZ 86336-5445

St Johns Clinic [Add](#)

[#cardio](#) [#groupPractice](#)

Organization, Group Practice

1910 S Falcon Ave Claremore OK 74019-2237

St Johns Hospital Cassville [Add](#)

[#hospital](#) [#medicare](#) [#npi](#)

Organization, Hospital

94 Main St Cassville MO 65625-1610

Didn't find what you are looking for? [Create New](#) Powered by **Veeva** Network

6. If the account is found, click **Add**.

The Search widget closes and the account is added as a draft to the first row of the hierarchy.

Mayo Clinic
200 1st St SW Ste S1123 Rochester MN 55905-5000

[All Hierarchies](#) [Primary Relationship](#) [+ Apply Filter](#)

[Child HCOs \(Direct 53 | Total 64 \)](#) [Ancestor HCOs \(Parents 0 | Total 0 \)](#) [Child HCPs \(Direct 65 | Total 393 \)](#) [Summary View](#)



<input type="checkbox"/>	Health Care Organization	Level	Roll-Ups		HCO Type								
<input type="checkbox"/>	DRAFT St Johns Clinic Actions #groupPractice #addiction #cardio #hospice #primarycare 1910 S Falcon Ave Claremore OK 74019-2237 Submit Delete	Level 1	<div> HCO</div> <table><tr><td>DIRECT</td><td>TOTAL</td></tr><tr><td>-</td><td>-</td></tr></table>	DIRECT	TOTAL	-	-	<div> HCP</div> <table><tr><td>DIRECT</td><td>TOTAL</td></tr><tr><td>1</td><td>1</td></tr></table>	DIRECT	TOTAL	1	1	Organization, Group Practice
DIRECT	TOTAL												
-	-												
DIRECT	TOTAL												
1	1												
<input type="checkbox"/>	Albert Lea Medical Center Mayo Health System Actions #addiction #hospice #hospital #npi 404 W Fountain St Albert Lea MN 56007-2437	Level 1	<div> HCO</div> <table><tr><td>DIRECT</td><td>TOTAL</td></tr><tr><td>1</td><td>1</td></tr></table>	DIRECT	TOTAL	1	1	<div> HCP</div> <table><tr><td>DIRECT</td><td>TOTAL</td></tr><tr><td>12</td><td>13</td></tr></table>	DIRECT	TOTAL	12	13	Organization, Hospital
DIRECT	TOTAL												
1	1												
DIRECT	TOTAL												
12	13												

7. Click **Submit**.
8. In the **New Affiliation** dialog, confirm the details and add notes to help Data Stewards to quickly action the DCR.



New Affiliation: All Hierarchies

New Affiliation
St Johns Clinic is being **added** to Mayo Clinic under All Hierarchies.

 Mayo Clinic +  St Johns Clinic

Relationship Type **Primary Relationship**

Notes
The changes you have made require approval. Please provide additional information to explain the changes.

9. Click **Submit** to send the data change request.


When the DCR is approved, the affiliation will be added.


Search widget options

If the account is not found in the Search widget results, you can start a new search or add the account.

- **Start a new search** - In the search results, click **Back to Search** to display the home page.

Search Accounts ✕



[Advanced Search](#)
Powered by  Veeva Network

Click **Advanced Search** to define additional keywords.



- **Add account** - Click **Create New**.

Add the details for the account and submit the data change request.

Search Accounts

[Back to Search Results](#)

New Health Care Organization

Clear All

Review Changes

Primary Information

Corporate Name *

HCO Type

Organization, Other

Major Class of Trade

Organization

Primary Specialty

-

Other Specialties

No options selected

Status

Active

Emails

+ Add Email

Websites

+ Add Website

NPI

HIN #

Tax ID

Primary Country

United States

ADD PARENT AFFILIATIONS TO PARENT HCPs

25R3

Widget users can now easily add parent HCOs to HCPs in the widget.

Trinity Health System

20555 Victor Pkwy Livonia MI 48152-7031

All Hierarchies

Ownership Hierarchy

Heart Failure Hierarchy

+ Apply Filter

Child HCOs (Direct Children 228 | All Children 1027)

Ancestor HCOs (Parents 0 | Total 0)

Child HCPs (Direct Children 15 | All Children 1407)

	Health Care Professionals	HCP Type	Specialty	Medical Degree
<input type="checkbox"/>	<div><div>Adam Davies</div><div>#md #npi #physician</div><div>560 W Putnam Ave # 4</div></div> <div><div>+ Add Parent Affiliation</div><div>View Parents</div><div>Edit Profile</div></div>	Prescriber	Hospitalist, Internal Medicine	Doctor of Medicine

This enhancement is available by default.



Prerequisite

Administrators must enable editing for the widget.

1. In the Admin console, click **Widgets & Portal > Network Widgets**.
2. Select a Hierarchy Explorer widget configuration.
3. In the **Editing Options** section, select **Enable Editing**.

Add a parent affiliation

To add an HCP to a parent HCO, add a Parent Affiliation to the HCP.

1. Parent Affiliations can be added from the **Child HCPs** tab in the following places:
 - Beside an HCP name, click **Actions > Add Parent Affiliation**.
 - In an HCP row, scroll to the **Parent Organizations** column. Click the link to open the **Parent Organization** details and click **Add Affiliation**.

Summary View Child HCOs (All Children 1027) Ancestor HCOs (Total 0) Child HCPs (All Children 1407)		
Health Care Professionals	Relationship Type %	Parent Organizations
<input type="checkbox"/> Adam Davies <small>Actions -</small> #cardio #imd #npi #physician #primarycare 5880 University Ave West Des Moines IA 50266	to Direct Relationship	Cass County Memorial Hospital + 6 more <small>Hide</small>
Parent Organization <small>+ Add Affiliation</small>	Specialty	VID
<input type="checkbox"/> Cass County Memorial Hospital <small>Actions -</small> #hospital #npi 1501 E 10th St Atlantic IA 50022-1936	Multi Specialty Practice	242976966049793025

2. A row is created in the **Parent Organization** table. Begin typing the affiliation name in the Search field.

Parent Organization	Specialty	VID
<input type="text" value="mercer"/> <div> <input type="checkbox"/> Mercer Bucks Cardiology #cardio #groupPractice #npi Organization, Group Practice 1 Union St Ste 101 Robbinsville NJ 08691-4219 </div> <div> <input type="checkbox"/> Mercer Bucks Cardiology #cardio #groupPractice Organization, Group Practice 104 Pheasant Run Ste 129 Newtown PA 18940-3439 </div> <div> <input type="checkbox"/> Mercer Surgical Group #groupPractice #vision Organization, Group Practice 1725 Klockner Rd Hamilton NJ 08619-2711 </div> <div> <input type="checkbox"/> Mercer Bucks Cardiology Yardley #cardio #groupPractice #npi Organization, Group Practice 777 Township Line Rd Yardley PA 19067-5552 </div> <div>Search More</div>		
	ity Practice	242976966049793025
	lar Disease	242977216483296257
	lar Disease	242977203363513344



Results begin displaying accounts from your Network instance that match the keywords.

3. Select an HCO to add as a parent affiliation.
4. The HCO is added as a row. The **Draft** icon displays beside the account name.

Summary View Child HCOs (All Children 1027) Ancestor HCOs (Total 0) Child HCPs (All Children 1407) Export to Excel Add Affiliation		
Health Care Professionals		Relationship Type % Parent Organizations
<input type="checkbox"/> Adam Davies Actions - #cardio #amd #mpi #physician #primarycare 5880 University Ave West Des Moines IA 50266		to Direct Relationship Cass County Memorial Hospital + 6 more Hide
Parent Organization Add Affiliation		Specialty VID
<input type="checkbox"/> DRAFT Mercer Surgical Group Actions - #groupPractice #vision 1725 Klockner Rd Hamilton NJ 08619-2711 Submit		Vision Practice, General Surgery 832884654922109968
<input type="checkbox"/> Cass County Memorial Hospital Actions - #hospital #mpi 1501 E 10th St Atlantic IA 50022-1936		Multi Specialty Practice 242976966049793025

Available actions:

- **Submit** - Click to send a DCR so the affiliation can be added to the account.
- **Delete** - Click the **Trash** icon to remove the draft affiliation.

5. If you click **Submit**, the **New Affiliation** dialog displays.

New Affiliation: All Hierarchies

New Affiliation

Adam Davies is being **added** to Mercer Surgical Group under All Hierarchies.

Mercer Surgical Group

+

Adam Davies

Relationship Type

-

Notes

The changes you have made require approval. Please provide additional information to explain the changes.

Discard

Save as Draft

Submit



Add the following details:

- **Fields** - Add or change the field values that will be included on the DCR.
- **Notes** - Add details to help the parent affiliation changes to be quickly approved.

Available actions:

- **Submit** - Click to send a DCR so the parent affiliation can be added to the account.
- **Save as Draft** - Click to keep the parent affiliation as a draft change.

Drafts are temporary and are removed when you leave or refresh the page.

- **Delete** - Click the **Trash** icon to remove the draft parent affiliation.

6. If you submitted the change, a DCR is created.

The HCO remains highlighted in green and displays a **Pending Review** icon. Click the icon to display details and the task ID.

When the DCR is approved, the Parent Affiliation is added.

FEATURE MESSAGE

25R2.1

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.

The widget is not available by default.

If Hierarchy Explorer is not enabled in your Network instance, a message displays when you try to add the widget:

Hierarchy Explorer Widget is not available. Please contact Network support to enable this widget.

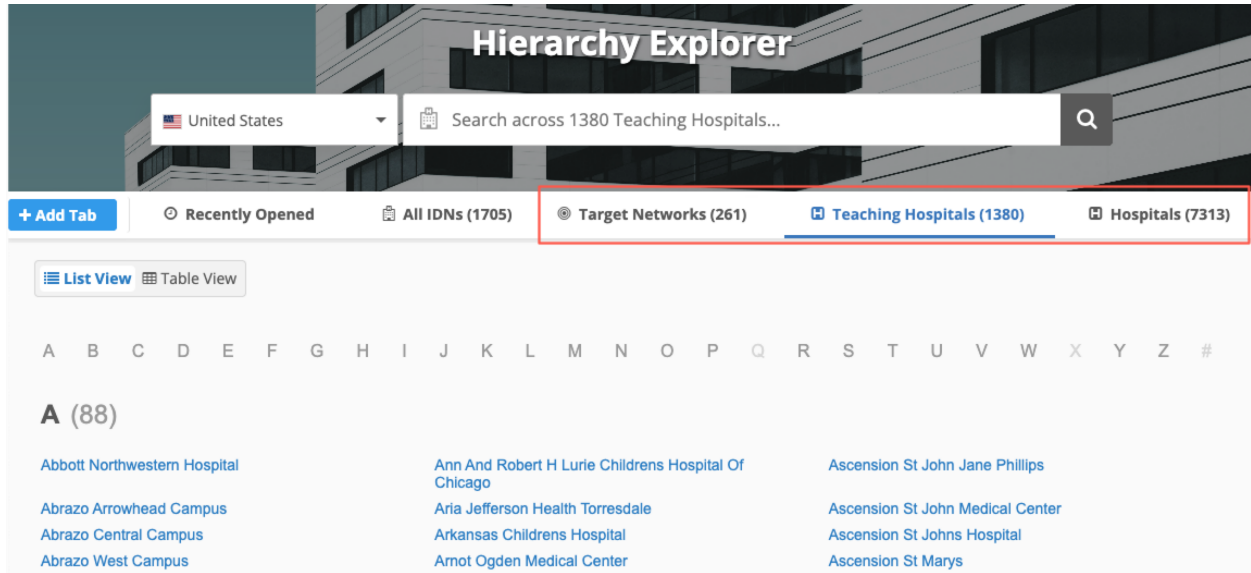
For more information, see [Enable the widget](#) in the *Veeva Network Online Help*.



HIERARCHY EXPLORER TABS

25R2.1

Widget users can create tabs on the homepage to organize segments of data. Previously, Administrators had to create multiple widgets for each of the data segments their users wanted to access (for example, hospitals, IDNs, Pharmacies).



This enhancement is enabled by default. Tabs can be created by any user.

Key highlights

- Tabs can be created to filter on segments of data.
- Tabs can be specific to countries or available to all countries.
- Administrators and Data Managers can create private tabs and public tabs for all users.
- All users can create private tabs.

Supported users

All Network users can create tabs in the widget.

User Type	Create Private Tab	Create Public Tab
Portal User	●	
Standard User	●	
Data Steward	●	
Data Manager	●	●
System Administrator	●	●
System and Data Admin	●	●



Create a hierarchy tab

To create a tab:

1. On the Hierarchy Widget homepage, click **Add Tab**.

New Tab

Name

Children's Hospitals

Icon

Hospital

Available To

☐ Just Me
 ☒ All Users

Countries

☐ All Countries
 ☒ Specific Countries

United States

Filters

FILTER	VALUE		
HCO Major Class of Trade	Hospitals	AND	x
HCO Specialty 1	46 items selected		x

pediatrics

Select All

18 / 18

☒ Acute Care Pediatrics (APNs or Only
 ☒ Adolescent Medicine (Pediatrics)
 ☒ Child Abuse Pediatrics

Cancel

Save

2. On the **New Tab** dialog, define a meaningful **Name**. The name will display to all users that can access the tab.

Names can contain a maximum of 25 characters.



3. **Icon** - Expand the list and choose an appropriate icon.
4. **Available to me** - Define who can access the tab.
 - **Just Me** - The tab is private. No other users can access the tab.
 - **All Users** - The tab is public. All widget users can access the tab.

Displays only for Administrators and Data Managers.

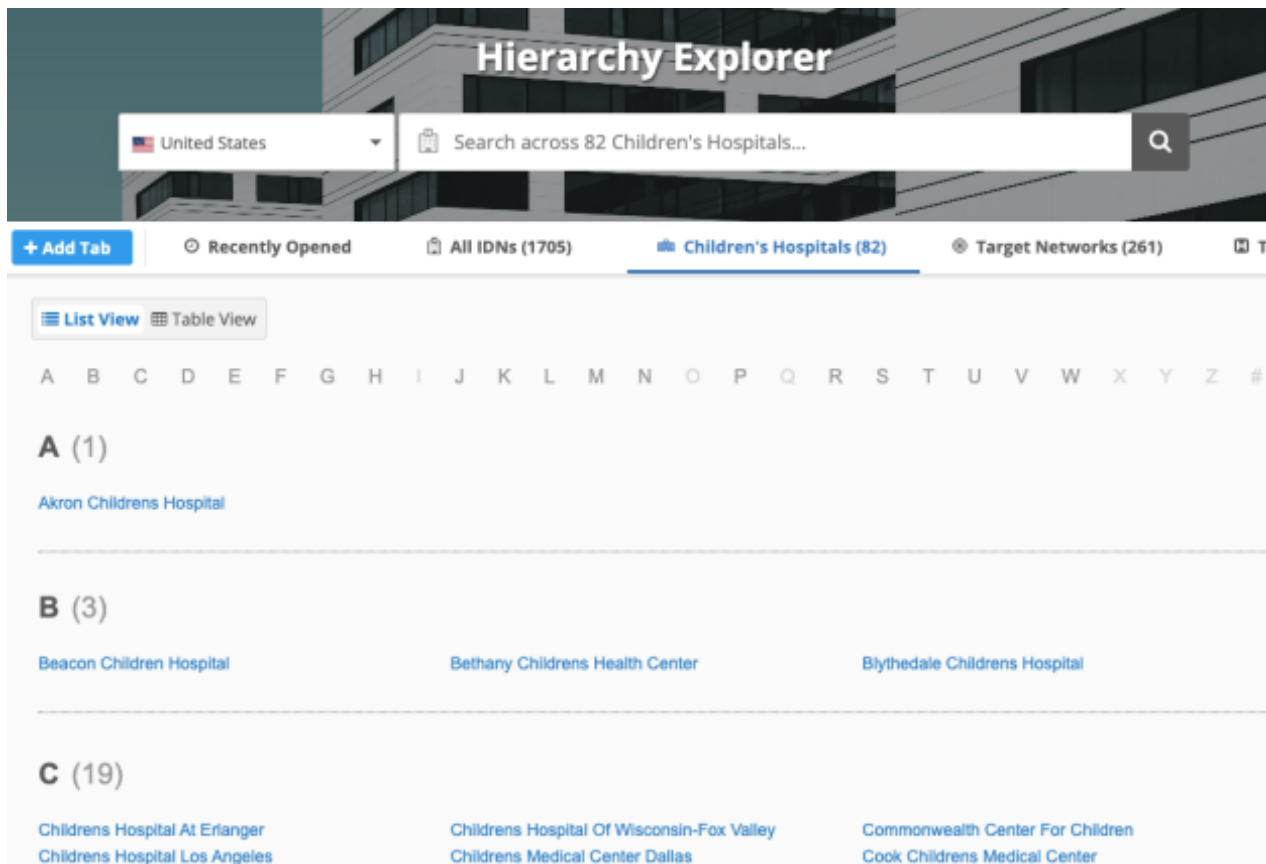
5. **Countries** - Define the countries for the tab. Users can access the tab if they have a data visibility profile for that country.
 - **All Countries**
 - **Specific Countries** - Choose from the list of countries defined for the widget.

6. **Filters** - Define the field and value to use to segment the accounts.

Filters are limited to the fields in the Hierarchy Index file. HCO fields and Address fields are supported.

7. **Save** your changes.

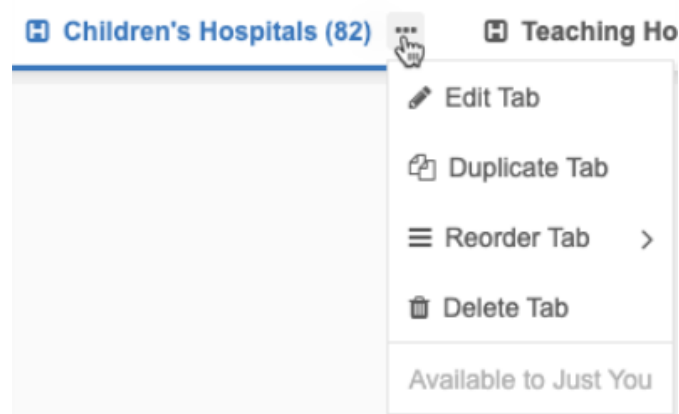
The tab displays on the widget homepage. A count of records displays beside the tab name.





Manage tabs

Hover over the tab name and click the **More (...)** icon to open the tab options.



Available actions

The actions that display depend on the type of tab (public or private) and your user type.

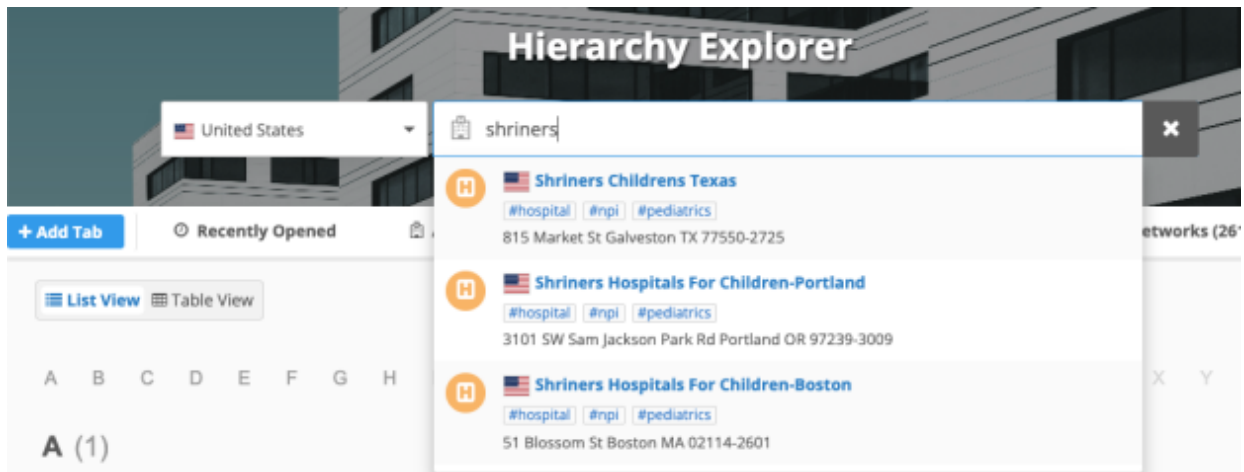
Action	Description	Key Details
Edit tab	Edit any of the details on the tab.	Private tabs can be promoted to public tabs only by the creator. Public tabs can be demoted to private only by the creator. Standard users cannot edit public tabs.
Duplicate tab	Make a clone of the tab to include all of the copied settings.	
Reorder tab	Move the tab to a different position. <ul style="list-style-type: none"> Move Right Move Left Move First Move Last Tip: You can drag and drop a tab to any position.	The Recently Opened tab cannot be moved. New tabs created by Administrators display immediately after the Recently Opened tab. Reordering tabs does not impact other users. The order is specific to each user.
Delete tab	Remove the tab from the widget.	

A message at the bottom of the menu identifies if the tab is private (**Available to just you**) or public (**Available to Everyone**).



Hierarchy Explorer search

Searching for an HCO on the homepage respects the tab that you are on when you search.



Logs

Administrators can track changes to the Hierarchy Explorer widget tabs in the **System Audit History**.

Tracked changes:

- Add private and public tabs.
- Update private and public tabs



EDITING HIERARCHIES

25R2.1

Business users can now add, remove, and edit affiliations directly within the Hierarchy Explorer widget.

The screenshot shows the Hierarchy Explorer widget for Sutter Health. At the top, there are tabs for 'All Hierarchies', 'Ownership Hierarchy', 'Sales Hierarchy', 'Neurology Hierarchy', and 'Oncology Hierarchy'. Below these, there are filters for 'Child HCOs (Direct 55 | Total 80)', 'Ancestor HCOs (Parents 0 | Total 0)', 'Child HCPs (Direct 42 | Total 102)', 'Summary View', 'Export to Excel', and a red-bordered '+ Add Affiliation' button. The main table lists organizations with columns for 'Health Care Organization', 'Level', 'Roll-Ups', 'HCO Type', and 'Major Class'. Two organizations are listed: 'Apex Medical Group Inc.' and 'Associated Internal Medicine'. A context menu is open over the first organization, showing options: 'Add Child HCO', 'Edit Affiliation', 'Remove Affiliation', and 'Edit Profile'.

This enhancement is available by default. Administrators can enable editing for the widget and for specific hierarchies.

Benefits

- **Easily add accounts to the hierarchy** - Add accounts to any level of the hierarchy. Previously, you had to jump to different accounts to find the correct affiliation.
- **Simplify custom hierarchy management** - Business users can edit custom hierarchies directly within the widget, streamlining the management process.

Key highlights

- Editing can be enabled for specific hierarchies.
- Add accounts or remove accounts in any level of the hierarchy.
- Edit relationships and accounts.
- Make the changes directly within the hierarchy view to understand the impact.
- Preview the changes as drafts before committing them.
- Submit DCRs against the hierarchy directly from the widget.

Enable editing

Administrators can enable editing in the Hierarchy Explorer widget configuration.

1. In the Admin console, click **Widgets & Portal > Network Widgets**.
2. Select a Hierarchy Explorer configuration.
3. In the **Editing Options** section, select **Enable Editing**.



Enable editing for hierarchies

When editing is enabled for Hierarchy Explorer, it is available by default for the following hierarchies:

- All Hierarchies
- Ownership Hierarchy

Enable editing for custom hierarchies

To enable editing in the widget for custom hierarchies:

1. In the Admin console, click **Data Model > Hierarchy Management**.
2. On the Hierarchy Management page, select a hierarchy.
3. In the **Editing Options** section, select **Enable Editing for this hierarchy**.

Hierarchy Management > Oncology Hierarchy

Oncology Hierarchy

Cancel Save

▼ Editing Options

☒ Enable Editing for This Hierarchy

Define default values for hierarchy changes (applied to Hierarchy Explorer).

ADD TO HIERARCHY

Define the default values when a new relationship is created in the hierarchy. The parenthco relationship status is set to Active for new relationships created automatically.

HCO-HCO

FIELD	VALUE
Oncology Hierarchy	Yes/True

+ Add Field

HCP-HCO

FIELD	VALUE
Oncology Hierarchy	Yes/True

+ Add Field



4. **Add to Hierarchy / Remove from Hierarchy** - Define the default field values that will be included in the DCR when users add or remove affiliations in the widget.

For example, set the **Oncology Hierarchy** field to `Yes/True` and the **Relationship Type** field value to `Affiliation` when users add HCO-HCO relationships.

Supported fields

- Reference fields that are included in the in the Hierarchy Index file.

System fields and the Hierarchy Type field does not display.

Note: When a new affiliation is added, the **Parent HCO Status** field is set to **Active** by default.

Define the fields for **HCO-HCO** and **HCP-HCO** relationships.

5. **Save** your changes.

Example

The default value for the **Oncology Hierarchy** field is set to `Yes/True` when users add an HCO-HCO affiliation in the Hierarchy Explorer widget.

New Affiliation: All Hierarchies

New Affiliation

Johnston Memorial Hospital is being **added** to Sutter Health under All Hierarchies.

Sutter Health

+

Johnston Memorial Hospital

Relationship Type

-

Oncology Hierarchy

Yes/True

Notes

The changes you have made require approval. Please provide additional information to explain the changes.

Discard

Save as Draft

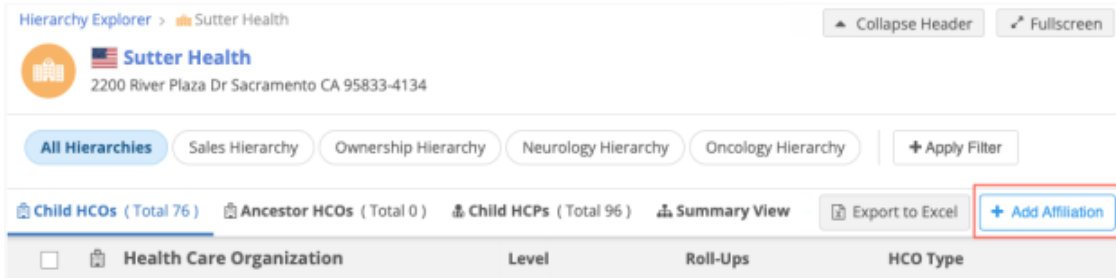
Submit



Add affiliations

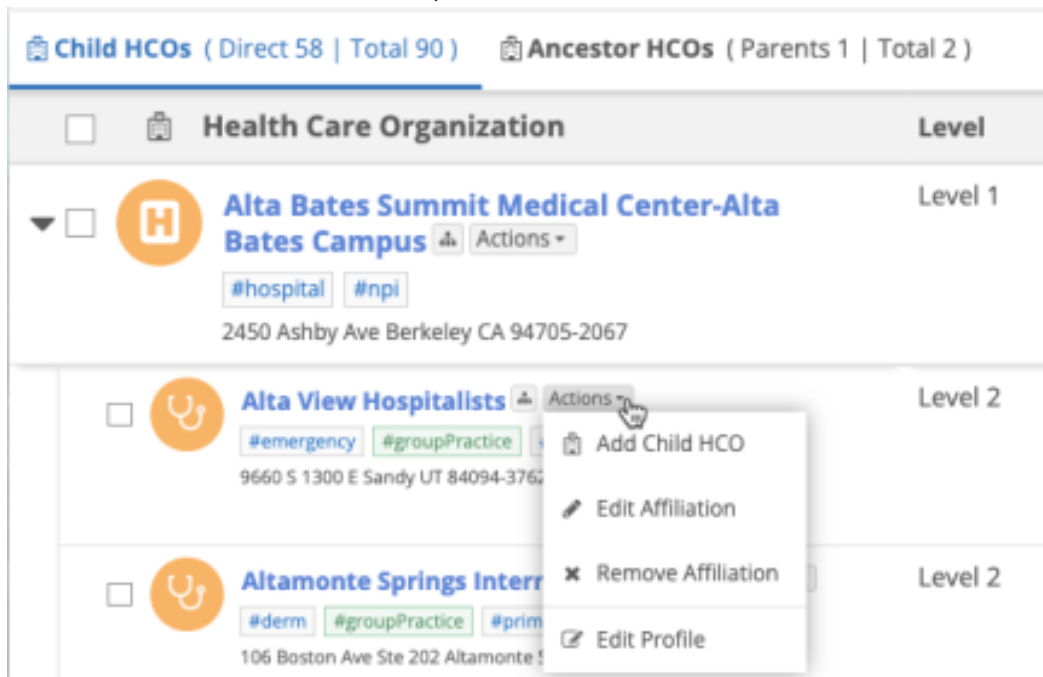
If editing is enabled for the hierarchy, affiliations can be added at any level of the hierarchy.

1. Add an affiliation using one of the following methods:
 - On the **Child HCOs** or **Child HCPs** tab, click **Add Affiliation**.



This creates a Level 1 affiliation.

- On the **Child HCOs** tab, click **Actions** beside an HCO name and select **Add Child HCO**.



2. A row is created in the hierarchy. Begin typing the affiliation name in the Search field.



Health Care Organization

HCO	TOTAL	HCP	DIRECT	TOTAL
Memphis Mental Health Institute	3	5	2	
Barton Memorial Hospital	-	1	1	
Regional Medical Center At Memphis	-	1	1	

Results begin displaying accounts from your Network instance that match the keywords.

3. Select an HCO/HCP to add as an affiliation.
4. The HCO/HCP is added as a row on the tab. The **Draft** icon displays beside the account name.

Child HCOs (Total 76)

Ancestor HCOs (Total 0)

Child HCPs (Total 96)

Summary View

Health Care Organization

Level

Roll-Ups

H

DRAFT Barton Memorial Hospital

#npi

#hospital

29 NW 1st Ln Lamar MO 64759-8105

Level 1

HCO

DIRECT	TOTAL	DIRECT
-	-	1

Available actions:

- **Submit** - Click to send a DCR so the affiliation can be added to the account.
- **Delete** - Click the **Trash** icon to remove the draft affiliation.

- If you click **Submit**, the **New Affiliation** dialog displays.



New Affiliation: All Hierarchies

New Affiliation
Barton Memorial Hospital is being **added** to Sutter Health under All Hierarchies.

Sutter Health

 → + →

Barton Memorial Hospital

Relationship Type
-

Oncology Hierarchy
-

Notes
The changes you have made require approval. Please provide additional information to explain the changes.

Discard

Save as Draft

Submit

Add the following details:

- **Fields** - Add or change the field values that will be included on the DCR.
- **Notes** - Add details to help the affiliation changes to be quickly approved.

Available actions:

- **Submit** - Click to send a DCR so the affiliation can be added to the account.
- **Save as Draft** - Click to keep the affiliation as a draft change.

Drafts are temporary. It is removed when you leave or refresh the page.

- **Delete** - Click the **Trash** icon to remove the draft affiliation.

6. If you submitted the change, a DCR is created.

The HCO/HCP remains highlighted in green and displays a **Pending Review** icon. Click the icon to display details and the task ID.

<input type="checkbox"/>	Health Care Organization	Level	Roll-Ups	HCO Type
	Barton Memorial Hospital Actions #npi #hospital 2170 South Ave South Lake Tahoe CA 96150-7026	Level 1	MCO MCP	Organization
<div>New Affiliation Submitted, Pending Review Submitted By: bob.smith@verteo.veevanetwork.com Date: 2025-09-08 14:17:17 Task ID: 947551560607141023</div>				TOTAL 1



Remove relationships from the hierarchy

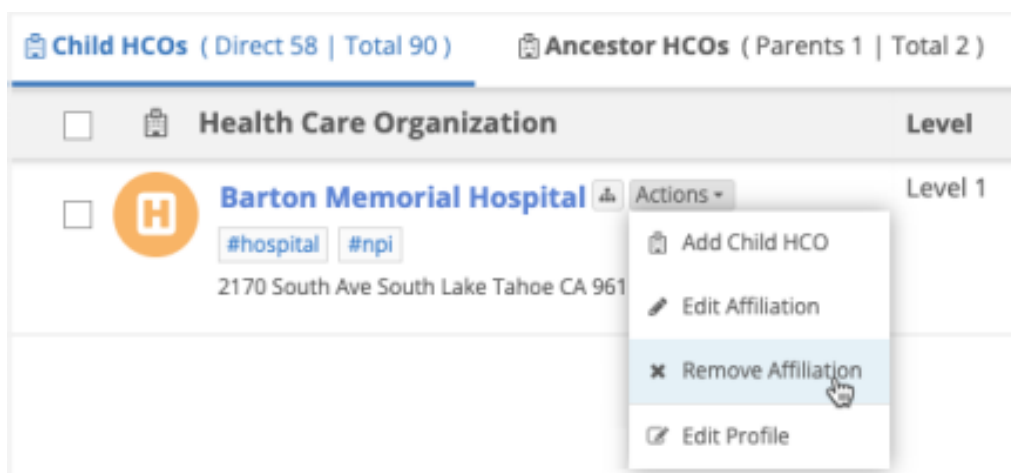
Business users can remove HCO-HCO and HCP-HCO relationships.

To remove a relationship:

1. **HCO-HCO relationship** - On the **Child HCOs** tab, click **Actions** beside an HCO name and select **Remove Affiliation**.

or

HCP-HCO relationship - On the **Child HCPs** tab, click **Actions** beside an HCP name and select **Remove Affiliation**.






2. The **Remove Affiliations** dialog confirms that the affiliation is being removed from the focused HCO.

The relationship status field will be changed from Active to Inactive according to the rules defined in the hierarchy configuration.



Remove Affiliation: All Hierarchies

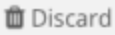
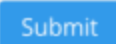
Remove Affiliation
Barton Memorial Hospital is being **removed** from Sutter Health under All Hierarchies.

 Sutter Health →  →  Barton Memorial Hospital

Updated Fields


FIELD NAME	CURRENT VALUE	NEW VALUE
Status	Active	Inactive


Notes
The changes you have made require approval. Please provide additional information to explain the changes.



 Discard  Submit

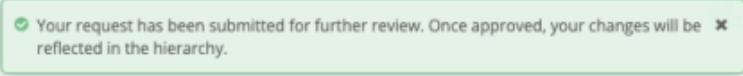
Available actions:

- **Discard** - Click to return to the hierarchy without removing the affiliation.
 - **Submit** - Click to continue to remove the affiliation.
3. If you submitted the change, a DCR is created and sent to Network.





The HCO/HCP remains highlighted in red and displays a red **Pending Review**  icon. Click the icon to display details and the task ID.





Hierarchy Explorer >  Sutter Health

  **Sutter Health**
2200 River Plaza Dr Sacramento CA 95833-4134

Your request has been submitted for further review. Once approved, your changes will be reflected in the hierarchy.

All Hierarchies Sales Hierarchy Ownership Hierarchy Neurology Hierarchy Oncology Hierarchy

 **Child HCOs** (Total 78)  **Ancestor HCOs** (Total 0)  **Child HCPs** (Total 98)  **Summary View**

<input type="checkbox"/>	Health Care Organization	Level	Roll-Ups
<input type="checkbox"/>	 Barton Memorial Hospital  #hospital #npi 2170 South Ave South Lake Tahoe CA 96150-7026	Level 1	 HCO  HCP

Affiliation Removed, Pending Review
Submitted By: bob.smith@verteo.veevanetwork.com
Date: 2025-09-08 21:50:59
Task ID: 947553344620858527

The relationship will be removed if the DCR is approved.



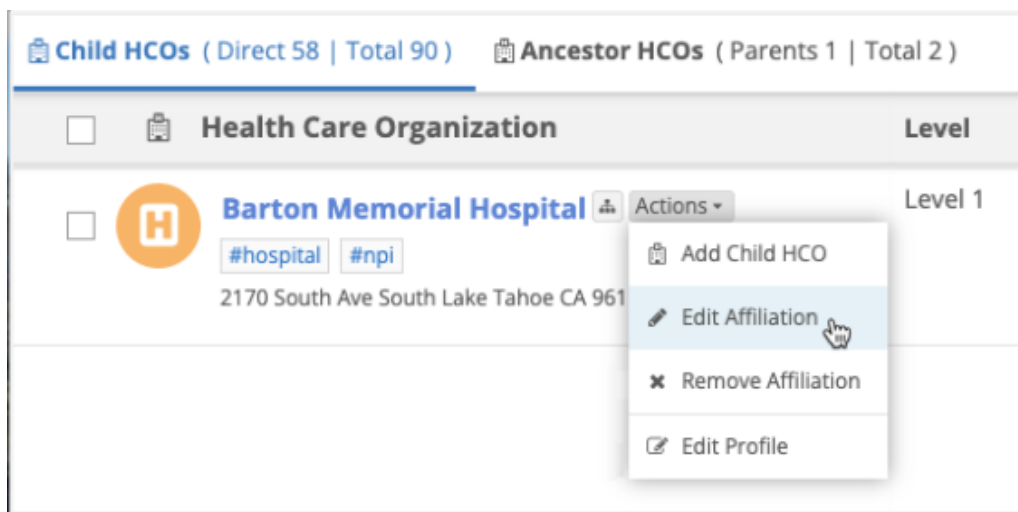
Edit relationships

Business users can edit HCO-HCO and HCP-HCO relationships.

1. **HCO-HCO relationship** - On the **Child HCOs** tab, click **Actions** beside an HCO name and select **Edit Affiliation**.

or

HCP-HCO relationship - On the **Child HCPs** tab, click **Actions** beside an HCP name and select **Edit Affiliation**.



2. On the **Edit Affiliation** dialog, define the following details:
 - **Fields** - Add or change the field values that will be included on the DCR.
 - **Notes** - Add details to help the affiliation changes to be quickly approved.



Edit Affiliation: All Hierarchies

Edit Affiliation

You are **editing** the affiliation between Barton Memorial Hospital and Sutter Health.

Sutter Health

 →

Barton Memorial Hospital

Relationship Type
Ownership

Oncology Hierarchy
Yes/True

Notes
The changes you have made require approval. Please provide additional information to explain the changes.

Updated relationship between Sutter and Barton.

Discard

Submit

Available actions:

- **Discard** - Click to return to the hierarchy without removing the affiliation.
 - **Submit** - Click to continue to remove the affiliation.
3. If you submitted the change, a DCR is created and sent to Network. The HCO remains highlighted in yellow and displays a yellow **Pending Review** icon. Click the icon to display details and the task ID.

Child HCOs (Total 78) | **Ancestor HCOs (Total 0)** | **Child HCPs (Total 98)** | **Summary View**

<input type="checkbox"/>	Health Care Organization	Level	Roll-Ups
<input type="checkbox"/>	<div> Barton Memorial Hospital #hospital #npi 2170 South Ave South Lake Tahoe CA 96150-7026</div>	Level 1	<div> HCO HCP</div>

Affiliation Edited, Pending Review
Submitted By: bob.smith@verteo.veevanetwork.com
Date: 2025-09-08 23:43:33
Task ID: 947553787295829151

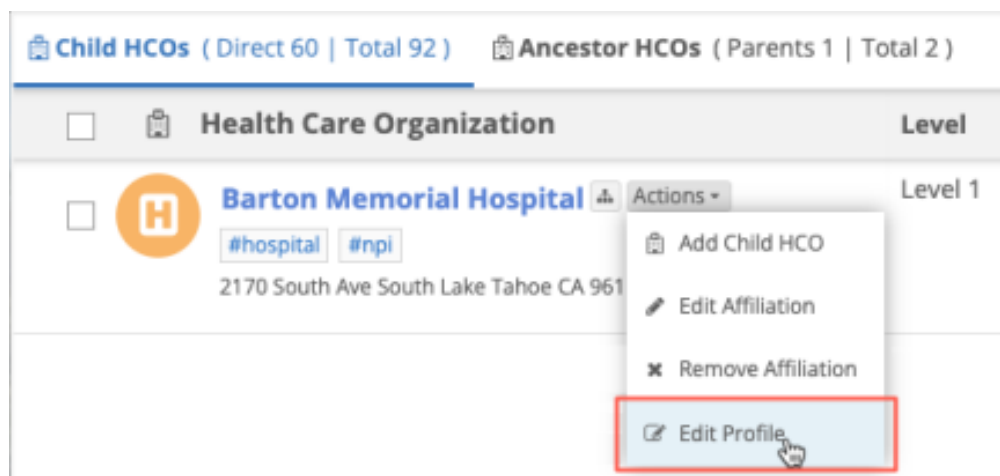
If the DCR is approved, the affiliation will be updated.



EDITING ACCOUNT PROFILES

25R2.1

Business users can now edit accounts within Hierarchy Explorer. Changes are submitted as DCRs.



Enable editing

Administrators can enable editing in the Hierarchy Explorer widget configuration.

1. In the Admin console, click **Widgets & Portal > Network Widgets**.
2. Select a Hierarchy Explorer configuration.
3. In the **Editing Options** section, select **Enable Editing**.

Edit an account

1. On the **Child HCOs** or **Child HCPs** tab, click **Actions** beside an HCO/HCP name and select **Edit Profile**.

The profile opens in edit mode.

2. Make any required changes to the account information, addresses, or licenses.

Note: Affiliations cannot be edited or removed on the account profile. The **Parent Affiliations** section is hidden in edit mode.

3. **Save** your changes.
4. The **Confirm Changes** dialog displays the fields that were changed. Click **Submit**.



Confirm Changes for Barton Memorial Hospital

The changes you have made may require approval. Please provide additional information to explain the changes.

Notes

Summary of Changes: Barton Memorial Hospital

FIELD NAME	CURRENT VALUE	NEW VALUE
Custom Fields		
Tier		TIER1

[Cancel](#) [Submit](#)

A DCR will be routed to the record owner to process the change.

INCLUDE RELATIONSHIP FIELDS

25R2.1

Administrators can include relationship fields for accounts to provide more details about their affiliations. Previously, only fields for HCOs and HCPs were supported on the respective account. Now you can add parent HCO fields, for example, you can add **Relationship Type** and **Record Owner Type** fields.

<div> Sutter Health 2200 River Plaza Dr Sacramento CA 95833-4134</div>				
<div>All Hierarchies Sales Hierarchy Ownership Hierarchy Neurology Hierarchy Oncology Hierarchy + Apply Filter</div>				
<div>Child HCOs (Direct 55 Total 80) Ancestor HCOs (Parents 0 Total 0) Child HCPs (Direct 42 Total 102) Summary View Export to Excel + Add Affiliation</div>				
<input type="checkbox"/> Health Care Organization		Oncology Hierarchy	Relationship Type	Record Owner Type
<input type="checkbox"/> Alta Bates Summit Medical Center-Alta Bates Campus #hospital #npi 2450 Ashby Ave Berkeley CA 94705-2067	Practice	No/False	Relationship Field	OpenData
<input type="checkbox"/> Apex Medical Group Inc #npi #pediatrics #primarycare 311 W 1 St Los Banos CA 93635-3479	nary Care Practice	No/False	Ownership	OpenData
<input type="checkbox"/> Barton Memorial Hospital #hospital #npi	Practice	No/False		Locally Managed



Supported fields

Reference fields can be added as fields.

Note: The fields must be included in the Hierarchy Index file. Contact Veeva Support to add the fields to the file.

Add fields

1. In the Admin console, click **Widgets & Portal > Network Widgets**.
2. Select a Hierarchy Explorer configuration.
3. In the **Additional Fields Displayed** section a heading is added for **Additional ParentHCO Fields**.

Fields can be added for HCO-HCO and HCP-HCO relationships.

4. Click **Add HCO-HCO Field**.
5. Select a field.

A maximum of three fields can be added for each relationship.

6. **Save** your changes.

ADDITIONAL PARENTHCO FIELDS

Define which additional ParentHCO fields you want to display (up to 3).

HCO-HCO

≡	Oncology Hierarchy	×
≡	Relationship Type	×
≡	Record Owner Type	×

HCP-HCO

≡	Oncology Hierarchy	×
≡	Record Owner Type	×

[+ Add HCP-HCO Field](#)



Data change requests

DCR APPROVAL RULES FOR SUSPECT MATCH TASKS

25R2.1

Administrators can now apply DCR approval rules to suspect match tasks. The rule is triggered if either the winning or losing record meets the rule criteria.

DCR Approval Rules

DCR Approval Rules

Your changes has triggered the following DCR approval rule(s). The DCR has been reassigned for further approval.

APPROVAL RULE	DESCRIPTION	TRIGGERED BY	DATE TRIGGERED	APPROVER	STATUS	DATE APPROVED
Suspect_Match_Hospital	This DCR will be routed to Supervisors	asha.singh@veetee.veevanetwork.com	2025-09-08 16:30:10 IST	SupervisorApprover	Pending Approval	

Close

This enhancement is available by default if the DCR Approval Rules feature is enabled in your Network instance.

To add the DCR Approval Rules feature to your Network instance, contact Veeva Support.

About DCR approval rules

Administrators can define rules to restrict Data Stewards from merging specific records.

For example, you can ensure that only supervisors and experienced Data Stewards can merge hospital or administrative HCO records because these changes can impact large HCO hierarchies.

When DCR approval rules are applied, Data Stewards can validate the information, but the DCR is automatically assigned to more experienced users for approval.

The DCR Approval Rules feature was released in Veeva Network 25R2.0 for add and change requests. For details, see [Multi-level DCR approval rules](#) in the *Veeva Network Online Help*.

Supported objects for suspect match rules

- Veeva standard objects (HCPs, HCOs)
- Custom main objects

Note: Approval rules for suspect match tasks cannot be applied to sub-objects.



Process for defining DCR 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 suspect match tasks that triggered the 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 user group for Data Stewards users that will be restricted from merging records.

You can also assign specific users to approval rules.

For detailed steps, see [Multi-level DCR approval rules](#) in the *Veeva Network Online Help*.

3. **DCR approval rule** - Define the conditions (object, country, fields) that will trigger the rule for suspect match tasks.

Create a rule for suspect match tasks

The DCR approval rule determines the records 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.
4. **DCR Approval Rules** - Define the tasks and filters that will trigger the approval rule.
 - **Apply To** - Define the types of requests that the approval rules will apply to.
Options:
 - **DCR Requests**
 - **Suspect Match Tasks**Choose **Suspect Match Tasks**.
 - **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 field values.



Example

Create a rule that prevents junior Data Stewards from merging HCOs that are hospitals because these changes can impact HCO hierarchies.

Suspect_Match_Hospital

DeleteCancelSave

▼ Details

Rule Name *

Suspect_Match_Hospital

Description *

Approvals for hospitals

Entity *

HCO

Country *

United States X

Status

☒ ENABLED

▼ DCR Approval Rules

Requests that meet these criteria will require further approval when processed by these users or groups.

APPLY TO *

Define types of requests that the approval rules will apply to:

Apply To

☐ DCR Requests

☒ Suspect Match Tasks

FILTERS

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

Group 1

X

FIELD	CONDITION	VALUE	
Health Care Organization HCO Type (hco_type__v) ▼	In ▼	Organization, Hospital X	X

+ Add Filter

+ Add Group

The rule will be triggered if the filter is true for the winning or losing record.

Important: If filters are not defined, all suspect match tasks for the object will be routed for approval.

49



5. **Rule Initiators** - Define the users that will trigger the approval process.

- **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, use this option to ensure that all users *except* Supervisors are restricted from merging hospital records.

Add the applicable user groups and users.

RULE INITIATORS *

Select user groups and users which will trigger this approval rule.
Triggering an approval rule means initiating the approval process whenever the conditions defined occur.

☒ Only user groups and users specified below will trigger this rule.

☐ All user groups and users except those specified below will trigger this rule.

User Groups

Search selected user groups ...

<input type="checkbox"/>	GROUP NAME	DESCRIPTION	TYPE	ACTIVE USERS	STATUS
<input type="checkbox"/>	Data Stewards	All active users with the data steward user type.	System Managed Group	9	Active

Displaying 1 to 1 of 1 Show 25 1 of 1

Users

Search selected users ...

<input type="checkbox"/>	NAME	USERNAME	USER TYPE	STATUS	SECURITY POLICY	PROFILE	INBOX TASK GROUPS
No users selected. Add users to this rule.							

RULE APPROVERS *

Define the approvers, who are able to process DCRs where rule applies. Tasks gets reassigned to these users or user groups as defined by the system administrator.

Inbox Task Groups

NAME	COUNTRY
SupervisorApprover	United States

6. **Rule Approvers** - Add the inbox task group for the users that can approve the suspect match. The suspect match task 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 suspect match task; the **Approvers** permission takes precedence. For rules applying to multiple countries, the suspect match task 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.



If a Data Steward tries to approve a suspect match task, the **DCR Approval Rules** dialog displays to advise that the task will be routed to Supervisors to process.

DCR Approval Rules

DCR Approval Rules

Your changes has triggered the following DCR approval rule(s). The DCR has been reassigned for further approval.

APPROVAL RULE	DESCRIPTION	TRIGGERED BY	DATE TRIGGERED	APPROVER	STATUS	DATE APPROVED
Suspect_Match_Hospital	This DCR will be routed to Supervisors	asha.singh@verteo.veevanetwork.com	2025-09-08 16:30:10 IST	SupervisorApprover	Pending Approval	

Close

DCR approval rules page

Administrators can easily identify the approval rules for suspect match tasks using the **Apply To** column.

DCR Approval Rules

Search Rules

1 items selected

Select Apply To

☒ Show Disabled Rules

Reset filters

Health Care Professional (7 enabled rules)

OBJECT

+ Add Rule

Health Care Organization (3 enabled rules)

OBJECT

+ Add Rule

Rule Name	Description	Countries	Apply To	Status
# of bed	# of bed	United States	DCR Requests	Enabled
Suspect_Match_Hospital	Approvals for hospitals	United States	Suspect Match Tasks	Enabled
HCONameAndStatusChange	Rules for HCO Name and Status Change	United States	DCR Requests	Disabled



Reports

JOB IMPACT DASHBOARD ENHANCEMENTS

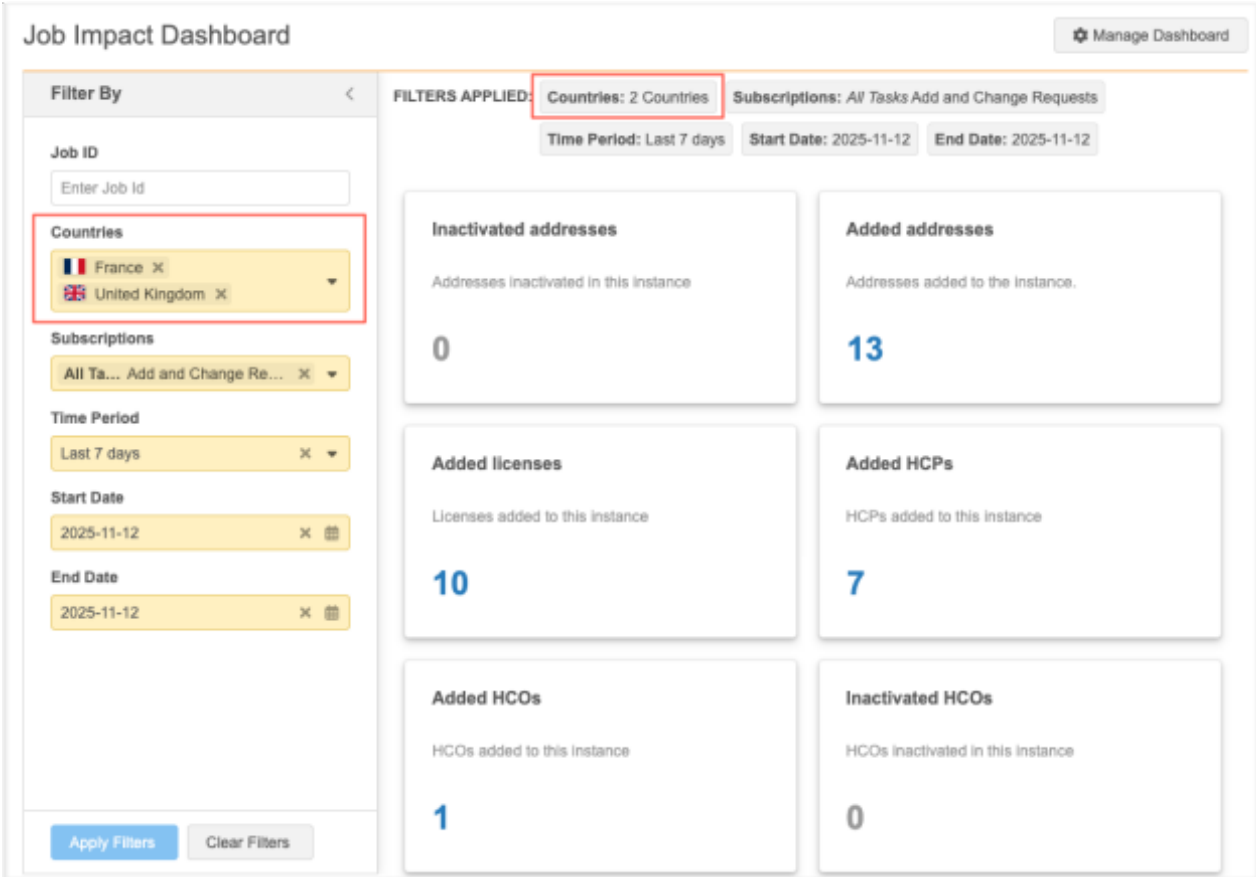
25R3

The Job Impact Dashboard feature was introduced in Network version 25R2.0 (August 2025).

The following enhancements are available in this release.

Country filter

Job Impact Dashboard queries can now be filtered by country.



This enhancement is available by default in your Network instance.



Country filter details

- **Available countries** - The **Country** filter lists all available countries in your Network instance. Countries are listed in ascending alphabetical order.
- **Country data** - Access to country data is applied through data visibility profiles.
If you do not have access to data in that country through your data visibility profile, you may not see all results.
- **Applied to query** - Country filters are applied when they can be, but are ignored if the tables included in the query don't have a country field.

Supported objects

Job impact Dashboard queries use the revision history reporting tables to return results. The country filter can be applied to the following entity level revision tables:

- HCPs
- HCOs
- custom objects

The **Country** filter can also be applied to Address revisions found in the address_revision table.

Revision history tables do not contain country data for Licenses, ParentHCOs, custom keys, or custom sub-objects. Join the tables for these objects to entity level revision tables where a country field does apply.

File names for downloaded results

The file names for results that are downloaded from a Network table are updated to identify the dashboard tile query name and the date and time that the query ran. Spaces and special characters are replaced with underscores (_).

Previously, the file name used the table identifier from the URL. For example, 947415887727299743.csv.

New file name

`<dashboard_tile_query_name>_<date_time>.csv`

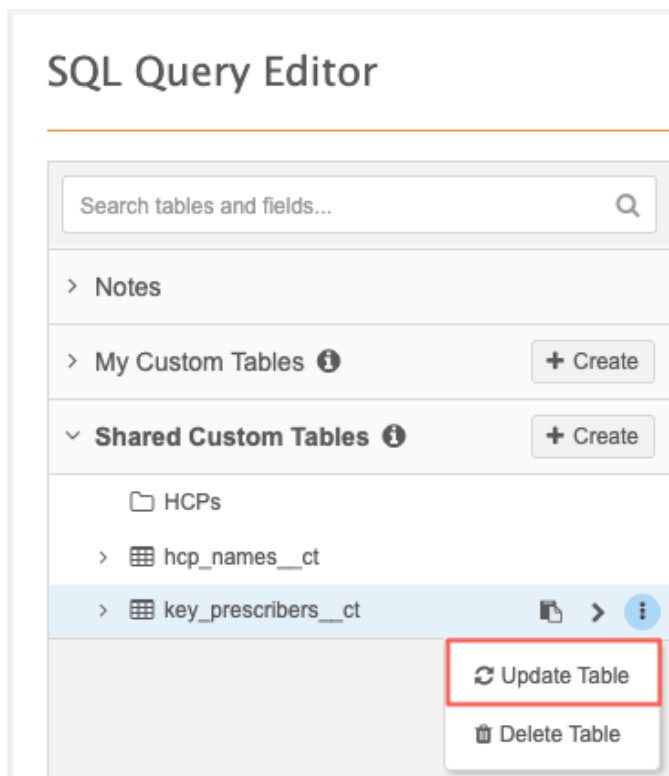
Example

`Inactivated_HCOs_2025-11-04-16-48-27.csv`

CUSTOM TABLES

25R3

Custom tables accessible in the SQL Query Editor can now be updated. Previously, custom tables could only be deleted or recreated using the same name.



This enhancement is enabled by default.

Supported tables

- **Existing custom tables only**

Tables cannot be updated using the **Create custom table** button after running a query.

- **Shared custom tables**

Any user can update a table in the **Shared Custom Table** section.

- **My Custom Tables**

Users can update tables they have created in the **My Custom Table** section.



Key considerations

- **Table names** - The table name cannot be changed to ensure that existing queries will not fail.
- **Changing the table structure** - If the table structure is changed, any saved reports that used column headers that are no longer there will fail.

Example

A custom table was updated and the **last_name__v** column was removed. The saved report that uses the custom table fails with an IO Exception.

The screenshot shows the 'NY prescribers' report configuration page. The query is: `select first_name__v, last_name__v from key_prescribers__ct`. An error message states: 'Unknown column last_name__v'. Below the query editor, the 'Result History' table shows the report's execution status.

DATE CREATED	STATUS	RESULT COUNT	FTP DIRECTORY	RESULTS FOLDER
2025-11-06 21:48:00 GMT	IO Exception	Not Available		
2025-11-06 21:45:00 GMT	Success			NY prescribers_9478864480329
2025-11-06 21:44:37 GMT	Success		Outboundreport	NY prescribers_9478864480329

A tooltip for the 'IO Exception' status reads: 'Report execution failed: Unknown column last_name__v'.

Update a custom table

Existing custom tables can be updated on the **SQL Query Editor (Reports)** page.

1. Expand the **My Custom Tables** or **Shared Custom Tables** sections in the tree view.
2. Hover over the table name to display the **More** icon and select **Update Table**.



3. On the **Upload File** tab, the following settings display:

- **Name** - The table name cannot be changed to ensure that existing queries will not fail.
- **Description** - Optionally change the description for the table changes.
- **Third Party Data** - Reconfirm whether a TPA is required and is in place.
- **Delimiter** - Optionally change the delimiter.
- **File Upload** - Choose one of the following options:
 - **show file preview before creating custom table**
 - **skip file preview, and create custom table**
- **Upload file** - Drag the updated file into the field or click **Upload File** to browse.

Resolve any validation issues that occur.

SQL Query Editor » Update Custom Table - key_prescribers__ct

Update Custom Table – key_prescribers__ct Cancel

Import a file that you can use as a reporting table to run reports.

1 Upload File
2 File Preview
3 Update Table

Table Name * key_prescribers__ct

Description

Table Type * ☐ My Custom Table ☒ Shared Custom Table

Save To Folder ?

Third Party Data * Does your file contain third party data (for example, data from IQVIA)?
☐ No ☐ Yes

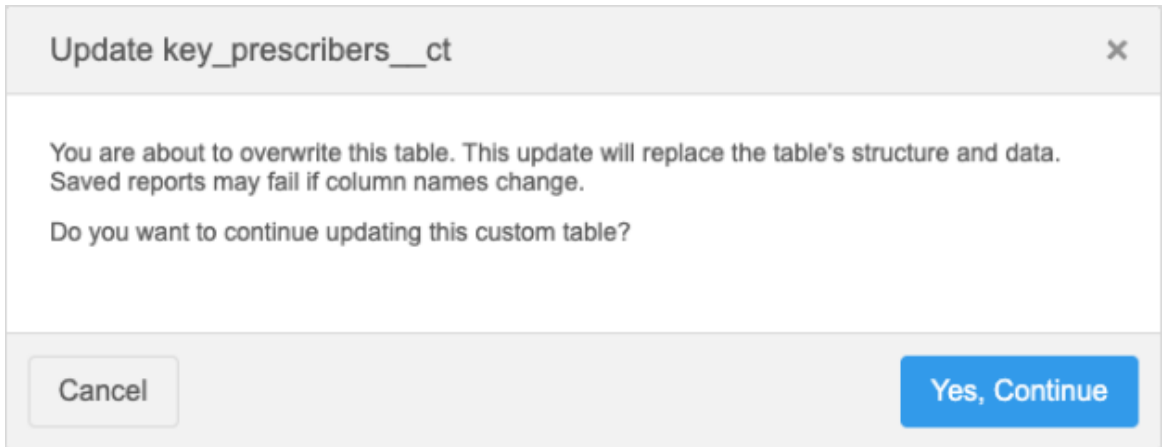
Delimiter

File Upload After uploading my file:
☒ show file preview before creating custom table
☐ skip file preview, and create custom table

Please fill in required fields before uploading files.



4. A pop-up displays to advise that you are overwriting the table and that any saved reports might fail if column names change.



Click **Yes, Continue** to confirm that you want to continue with the changes.

5. If you chose to skip the file preview, the table is created.
6. If you chose to preview the file after it is uploaded, the **File Preview** tab opens.

A count of the records displays. This is the total number of rows that will be created in the custom table, not including the column header.

The first four rows of the file display so you can preview the data before you create the table.

Updated table details

Updates to the table are tracked. Expand the table metadata to see the following details:

- **Updated By** - User that updated the custom table.
Displays in the **Shared Custom Tables** section only.
- **Updated Date** - Date that the table was updated.
- **Updated By** - Method the table was updated. The value is always *File Upload* even if the table was created from a reporting query or transformation query.



My Custom Tables ⓘ

+ Create

Shared Custom Tables ⓘ

+ Create

HCPs

hcp_names__ct

key_prescribers__ct

Description

NY Prescribers

Created By

maria.lopez

Created Date

October 28, 2025

Created From

File

Updated By

andy.ong

Updated Date

October 28, 2025

Updated From

File Upload

Collapse All

Audit

Updates to custom changes can be tracked by administrators in the System Audit History. To quickly find these updates, use the following **Object Type** filter: ReportingCustomTable. The **Edit Event Description** is added to support update action.

System Audit History

Export

Date range

To

2025-10-26

2025-11-02

Object Types

ReportingCustomTable X

Properties

Select an option

Get History

Reset

Choose time period...

EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE
947886465057295519	2025-10-28 21:47:53 GMT	andy.ong@verteo.veevanetw...	hcp_vids__ct	Edit	ReportingCustomTable	Description	NY Prescribers
947886465057295519	2025-10-28 21:47:53 GMT	andy.ong@verteo.veevanetw...	hcp_vids__ct	Edit	ReportingCustomTable	Confirmed IQVIA TPA	false
947886465057295519	2025-10-28 21:47:53 GMT	andy.ong@verteo.veevanetw...	hcp_vids__ct	Edit	ReportingCustomTable	No TPA Required	false
947886465057295519	2025-10-28 21:47:53 GMT	andy.ong@verteo.veevanetw...	hcp_vids__ct	Edit	ReportingCustomTable	Data Path	/data2/ftp/etc/instance_5
947886465057295519	2025-10-28 21:47:53 GMT	andy.ong@verteo.veevanetw...	hcp_vids__ct	Edit	ReportingCustomTable	Source	File



TEST QUERIES IN THE JOB IMPACT DASHBOARD

25R2.1

Queries can now be tested on the tile configuration. Test the query to ensure it returns the desired results before adding the tile to the dashboard. Previously, queries could be tested in the SQL Query Editor only.

Job Impact Dashboard > Job Impact Dashboard Settings > Added HCPs

Added HCPs

Duplicate Delete Cancel Save

Details

Name * Added HCPs

Description * HCPs added to this instance

Status ☒ Enabled

Query

Queries should include child revision tables, i.e. hcp_revision or address_revision, so dashboard filters can be applied. Test query before adding to the dashboard.

Format Sample Queries **Test Query**

```
1 SELECT
2   hcp.primary_country__v,
3   revision.job_id,
4   revision.source,
5   revision.subscription,
6   hcp_revision.vid__v AS HCP_Vid,
7   hcp.first_name__v,
8   hcp.last_name__v,
9   hcp.specialty_1__v,
10  hcp.hcp_type__v,
11  hcp.record_state__v,
12  revision.created_at
```

This enhancement is enabled by default.

Test a query

Queries can be tested only after a new tile or duplicated tile is saved.

1. On the Job Impact Dashboard (**Reports**), click **Manage Dashboard**.
2. Click **Add Tile** or duplicate an existing tile.
3. Provide any required information in the **Details** section.
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.
5. **Save** the tile.
6. Open the tile again.
7. In the **Query** section, click **Test Query**.



Test Query

×

Job ID

Enter Job Id

Subscriptions

Select Subscription

Time Period

Select Time Period

Start Date

2025-09-02

×

📅

End Date

YYYY-MM-DD

📅

Apply Filters

Clear Filters

```

SELECT
  hcp.primary_country__v,
  revision.job_id,
  revision.source,
  revision.subscription,
  hcp_revision.vid__v AS HCP_Vid,
  hcp.first_name__v,
  hcp.last_name__v,
  hcp.specialty_1__v,
  hcp.hcp_type__v,
  hcp.record_state__v,
  revision.created_at
FROM
  revision
JOIN
  hcp_revision ON revision.revision_id = hcp_revision.revision_id
JOIN
  hcp ON hcp_revision.vid__v = hcp.vid__v
WHERE
  hcp_revision.verb = 'Add'
  AND hcp.record_state__v IN (
    'VALID',
    'UNDER_REVIEW'
  )

```

Click "Apply Filters" or adjust filters to see dashboard results.

8. In the **Test Query** dialog, provide sample filters.
9. Click **Apply Filters**.

The query runs and provides counts for a snapshot of one tile.

Added HCPs

HCPs added to this instance

11

10. If a count (greater than 0) displays, click the link to view the results in a Network table.
11. To edit the query, close the pop-up and return to the tile to make the changes and then test the query again.



Data model

COMMON DATA ARCHITECTURE (CDA) FIELD MAPPING

25R3

The following HCP field mapping is updated for the Latin America region.

HCP CDA Field	HCP CDA Label	New field mapping	Previous field mapping
nhid_cda__v	National Healthcare ID (CDA)	organization_id__v	tax_id__v

This change is enabled by default.

If you do not have the CDA enabled in your Network instance, there is no impact.

Field mappings

CDA fields are mapped to legacy Veeva fields. To review the mappings for all CDA fields and regions, download the *Calculation of CDA fields.xlsx* document from the [CDA data model fields](#) topic in the *Veeva Network Online Help*.

CLUSTER MANAGEMENT

25R3

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

The following enhancements are available in this release.

Support for Hungary

The following country/third party cluster provider combination is now supported:

- Hungary - IQVIA™

Important: A TPA must be signed with the third party cluster provider before this data can be used in the Cluster Management feature.

For more information, see the topic called [Managing clusters](#) in the *Veeva Network Online Help*.



Updated cluster codes for the Netherlands

Updated cluster codes from FarmInform™ are available for the Netherlands.

New cluster version

- Version 2.0.

The new cluster version is available by default if you have the Netherlands and FarmInform country/provider combination enabled in your Network instance.

Update addresses

To update addresses with the latest cluster codes:

1. In the Admin console, click **Data Model > Cluster Management**.
2. Select the Netherlands / FarmInform cluster configuration.
3. In the **Cluster Management Details** section, expand the **Cluster Version** field and choose **Version 2**.
4. **Save** your changes.
5. Click **Refresh Addresses** to run a data maintenance job to ensure that all Netherlands addresses have the latest cluster codes.

COMMON DATA ARCHITECTURE (CDA)

25R2.1

The Veeva ID CDA field (`veevaid__v`) is now enabled by default in all Network instances. This field is the global identifier from Veeva data products and is used in the CDA data model.

This system field is enabled, even if the CDA data model is not enabled, so all customers and downstream systems have access to this Veeva-wide ID.

Supported countries

The Veeva ID is enabled for OpenData countries where CDA is supported. CDA is not supported for China, Hong Kong, Japan, and Macao.

For more information, see [Common Data Architecture \(CDA\)](#) in the *Veeva Network Online Help*.



Veeva ID and VID fields

The Veeva ID and VID fields are both ID fields used in Network, but they have differences.

Comparison


ID	Definition	Supported records	Supported entities	Format
Veeva ID	The global identifier used across Veeva data products.	Veeva OpenData records	HCP, HCO	21-character string HCP: V+01+VID HCO: V+02+VID
VID	Unique ID assigned by Veeva Network.	Local records Veeva OpenData records Third party records	HCP, HCO, Address, License, Parent HCO, custom objects	18 digits

Example ID field formats

Entity	VID	Veeva ID
HCP	243205709943014403	V01243205709943014403
HCO	242976940179325951	V02242976940179325951

View Veeva ID on record profiles

The Veeva ID displays in the **Primary Information** section on standard profile layouts.



Trinity Health System ☆
#healthsystem
FULL ADDRESS 20555 Victor Pkwy Livonia MI 48152-7031
Organization, Health System, Unspecified specialty

Primary Information
Addresses
Parent HCO Affiliations
Child Affiliations
General Information
Hierarchy

▼ Primary Information

Corporate Name ⓘ
Trinity Health System

VID ⓘ
242979616908641280 🔒

Veeva ID ⓘ
V02242979616908641280 🔒

Primary Country ⓘ
United States 🔒

If you have created custom profile layouts for a country, add the field to the layout.



Veeva ID field updates

The field is populated when the record is updated by Veeva OpenData (any field) and then is downloaded to your Network instance.

Vault CRM integrations

The Veeva ID field is used across Veeva data products.

Vault CRM administrators must map the Veeva ID field in their HCP and HCO mappings.

Network field (HCP, HCO objects)	Vault CRM field
veevaid__v	veevaid__v

CLUSTER CODES FOR GERMANY

25R2.1

Updated cluster codes from IQVIA™ are available for Germany.

New cluster version

- Version 7.0.

The new cluster version is available by default if you have the Germany and IQVIA country/provider combination enabled in your Network instance.

Update addresses

To update addresses with the latest cluster codes:

1. In the Admin console, click **Data Model > Cluster Management**.
2. Select the Germany / IQVIA cluster configuration.
3. In the **Cluster Management Details** section, expand **Cluster Version** and choose **Version 7**.
4. **Save** your changes.
5. Click **Refresh Addresses** to run a data maintenance job to ensure that all German addresses have the latest cluster codes.



Match

ADD REQUEST MATCH RULES FOR LATIN AMERICA

25R3.0

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

This enhancement is enabled by default in your Network instance.

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.



Add Request Match Configuration

Advanced Cancel Save

This page allows you to set your own default rules that can then be used by all Add Requests. All users and systems submitting add requests to this instance use this one subscription and therefore use the same match rules. If custom rules have not been defined for a particular country, Network's default rules are used. The default rules are periodically updated by Network as improvements are introduced.

Country: Argentina

Data Groups (3) Match Rules (8) Match Filters (0) Ranked Filter Groups (0)

The Match Rules dictate how matching is performed between selected records and those in the Network instance, within each Data Group. For instructions on setting up Match Rules, please refer to the [online help](#).

Entity: Health Care Professional

If filters are configured on individual match rules or on the "Match Filters" tab:

- ☐ Apply match rules whether incoming records have a value in a filtered field or not.
- ☒ Apply match rules only if incoming records have a value in a filtered field.

▼ Health Care Professional Feature Sets

☒ Default ⓘ ☐ Override ⓘ + Add Feature Set

NAME	FEATURES	ENABLED
Auto-Merge - ACT ⓘ		
names are identical and lice...	names are identical, licenses match	✓
names are identical and ad...	names are identical, address matches	✓
names are identical with mi...	names are identical with middle initial, licenses match	✓

Custom match rules

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



MATCH SUMMARY

25R2.1

The **Match Summary** section for job details now contains match statistics as percentages (%). The section previously contained only record counts.

New statistics are added for the processed data:

- % Not Matched
- % ACT Matches
- % ASK Matches

▼ Data Load Summary

ENTITY	ROWS READ	ROWS PARSED
HCP	20	20

▼ Match Summary

ENTITY	NOT MATCHED	% NOT MATCHED ⓘ	ACT MATCHES	% ACT MATCHES ⓘ	ASK MATCHES	% ASK MATCHES ⓘ
Health Care Organization	0	0%	0	0%	0	0%
Health Care Professional	5	25%	10	50%	5	25%

Note: The percentages may not equal 100 due to rounding.

This enhancement is enabled by default.

Supported features

The new statistics are available in the **Match Summary** section in the Job Details for the following features:

- Subscriptions that contain the Match Summary
- Data Deduplication jobs



Network Expressions (NEX)

The following functions are now supported in Network Expression Rules.

ABS()

25R2.1

Use to return the absolute value of a number. For example, 5 is returned as 5.

```
ABS (number)
```

Examples

NEX	Result
ABS(-4.2)	4.2
ABS(4.2)	4.2

AT()

25R2.1

Use to retrieve an element in a comma separated list of values, where index = 0 refers to the first element in the array.

```
AT (list, index)
```

Examples

NEX	Result
AT(['cd','ed','em','gp','hm','np','on'], 0)	'cd'
AT(['cd','ed','em','gp','hm','np','on'], 2)	'em'
AT(['cd','ed','em','gp','hm','np','on'], 7)	null

CEIL()

25R2.1

Use to round a number up to the nearest whole number. For example, if the number is 4.1, 5 is returned.

```
CEIL (number)
```

Examples

NEX	Result
CEIL(4.1)	5
CEIL(4)	4



FLOOR()

25R2.1

Use to round a number down to the nearest whole number. For example, if the number is 4.9, 4 is returned.

```
FLOOR (number)
```

Examples

NEX	Result
FLOOR(4.9)	4
FLOOR(4)	4

ROUND()

25R2.1

Use to change a number to the closest whole number. If the number ends in .5 (for example, 4.5), it always rounds up.

```
ROUND (number)
```

Examples

NEX	Result
ROUND(3.14)	3
ROUND(3.5)	4
ROUND(3)	3
ROUND(3.14159*10)/10.0	3.1
ROUND(3.14159*100)/100.0	3.14

For all available functions, see [NEX functions](#) in the *Veeva Network Online Help*.

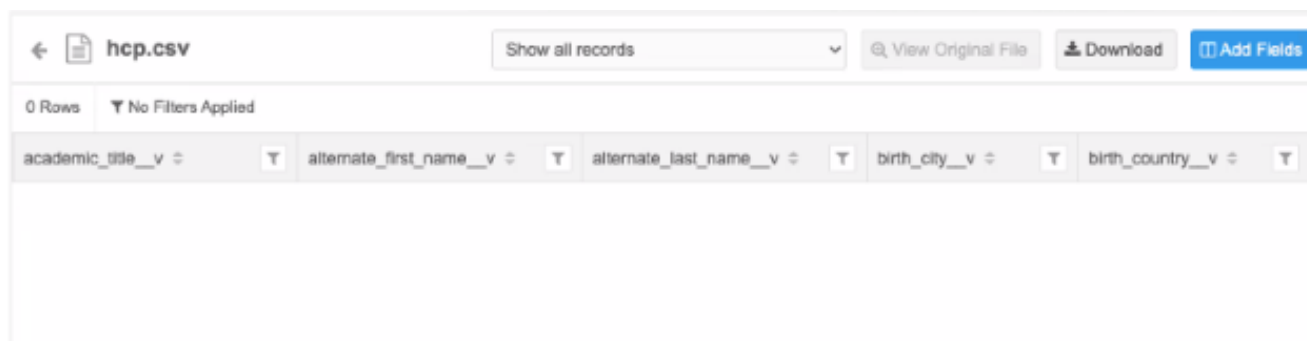


Target subscriptions

INCLUDE HEADER ROW IN EMPTY EXPORT FILES

25R2.1

Files that are exported from Network without data can now contain headers so downstream systems can consistently process the file format.

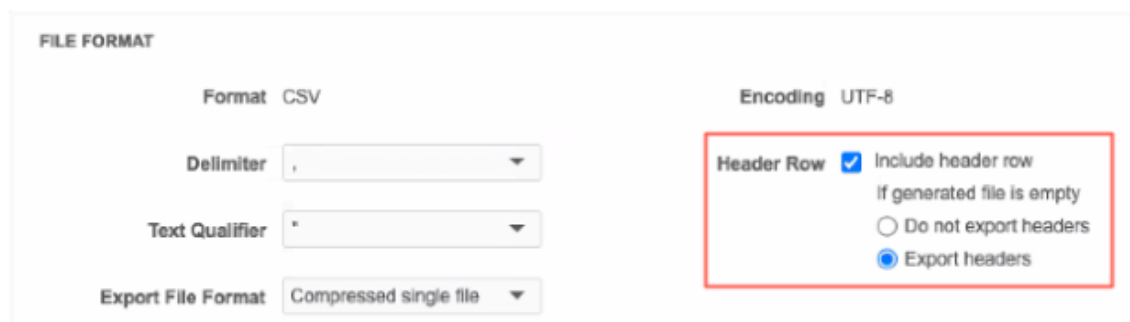


This enhancement is available by default in your Network instance. Administrators and Data Managers can enable the setting in target subscription configurations.

Include header rows on empty files

Target subscription configurations contain a new setting to include header rows on empty files.

The setting displays if the **Include header row** option is selected in the **File Format** section.



Choose the behavior for including a header row if the generated file is empty:

- **Do not export headers** (default)
- **Export headers**

Existing configurations

There is no impact to existing configurations.

If the **Include header row** setting is enabled in an existing subscription, the **Do not export headers** option is set by default.

Administrators can change the option to **Export headers**.



Vault CRM integrations

VALIDATE VAULT CRM BRIDGE

25R3

The **Validate Vault CRM Bridge** job checks the mappings between Network and Vault CRM. The validation is extended to identify common mapping and configuration issues, for example, picklist and field dependencies for Vault CRM object types.

In addition, the validation file that you can download after the job completes is updated to help you identify the issues and records to fix.

Additional mapping checks

The Network Bridge validation now checks for the following mapping issues. The issues are identified on the sheets in the .xlsx file that you download after the job runs.

Mapping	Check	Validation Note or Action								
Vault CRM status__v field	Ensure there are no Network Field Mappings for the Vault CRM API status__v field.	Network Field Mapping sheet Cannot map to Vault CRM status__v (bulk updates not supported).								
Network Address Inheritance fields	If any Network Address Inheritance field is mapped to a CRM field, check that all the three required fields are mapped. <ul style="list-style-type: none">- parent_address_vid__v- parent_address_sync__v- parent_address_entity_vid__v	Network Field Mapping sheet Vault CRM address inheritance requires 3 mapped fields. Missing: {crm fields missing}.								
Formula fields	Ensure there are no mappings to Vault CRM formula fields. For example, some CDA fields are formula fields.	Network Field Mapping sheet Cannot map to Vault formula field {crm field name}; Network cannot update formulas.								
Boolean reference values	Ensure that the standard boolean values are mapped.	Missing Network Ref. Mapping sheet Provides the standard mapping. <table><tr><th>Network Reference Code</th><th>Vault CRM Picklist Value</th></tr><tr><td>Y</td><td>true</td></tr><tr><td>N</td><td>false</td></tr><tr><td>U</td><td>false</td></tr></table>	Network Reference Code	Vault CRM Picklist Value	Y	true	N	false	U	false
Network Reference Code	Vault CRM Picklist Value									
Y	true									
N	false									
U	false									



Mapping	Check	Validation Note or Action
External ID	Ensure the <code>object_reference_mapping__v</code> field is populated for External ID field mappings.	Network Field Mapping sheet Referenced object mapping does not exist.

Configuration checks

The Network Bridge validation now checks for the following common configuration issues.

Configuration	Check	Validation Action
Vault CRM Integration user validation		
Integration user - Network Admin	<p>Ensure the Vault CRM Integration user is set as the Network Admin.</p> <p>The Network Admin field on the Integration user must be selected.</p>	Network Mapping sheet CRM integration user's 'Network Admin' field is false; set it to true.
Integration user - Countries	<p>Ensure the Vault CRM Integration user has all the mapped countries listed in the user's Network Additional Countries field.</p> <p>All mapped countries need to be included in one of the following fields on the user account.</p>	Network Mapping sheet The CRM integration user's 'Network Additional Countries' field requires all mapped countries. Add these countries: {list of missing countries}.
Object Type validations		
HCP and HCO Object Types	<p>Ensure the Default HCP and HCO Object Types are populated in Vault CRM.</p> <p>On the <code>network_settings__v</code> record, check if the following fields have values:</p> <p>default_hco_account_type__v default_hcp_account_type__v</p>	Network Object Mapping sheet Default HCP/HCO Object Types are not configured in Vault CRM Network Settings. Please update.
Object Type - Fields	<p>Ensure all mapped fields are available for the object types used in the integration.</p> <p>Relevant object types are determined by the default HCP and HCO in the Network Settings in addition to any object types included in a field mapping to the <code>object_type__v</code> field.</p>	Network Field Mapping sheet Field is not available for object types, see Configuration Issues sheet.



Configuration	Check	Validation Action
Object Type – Picklist Values	<p>Ensure all mapped picklist field values are available for the object types used in the integration.</p> <p>Relevant object types are determined by the default HCP and HCO in the Network Settings in addition to any object types included in a field mapping to the object_type__v field.</p> <p>Only check Network codes that are active for the mapped countries.</p>	<p>Network Reference Mapping sheet</p> <p>Picklist value is not available for object types, see Configuration Issues sheet.</p> <p>The Configuration Issues sheet identifies the picklists that should be added or removed for the object type for each country.</p>
Picklist dependency validations		
Country dependencies	<p>Check that country-specific picklist dependencies are configured in Vault CRM for mapped picklist values.</p> <p>The check is only done for picklist fields in CRM where the controlling field is the same field that is mapped to primary_country__v (HCP/HCO) or country__v (Address) in Network.</p> <p>Check only for mapped countries.</p>	<p>Network Reference Mapping sheet</p> <p>Incorrect picklist dependencies, see Configuration Issues sheet.</p>
Data Change Request Results	<p>All picklist values for the Results field are enabled for the three object types on the Data Change Request (data_change_request__v) object:</p> <ul style="list-style-type: none">• account__v• address__v• child_account__v	<p>Network Reference Mapping sheet</p> <p>If there are any issues, see the Configuration Issues sheet.</p>
Valid Network Reference Code	<p>Reference codes are no longer marked invalid if they are present but are not used in a mapped country.</p>	<p>Network Reference Mapping sheet</p> <p>Picklists that are mapped but are not used by a mapped country are marked as Valid.</p> <p>Picklists are marked invalid if they are used by a mapped country but are not active in Network.</p>

Bridge validation file

The following changes have been made to the file that you can download after the validation runs.

Configuration Issues sheet

A new sheet is added to the file to identify the following Vault CRM configuration issues:

- Picklist Dependency



- Object Type - Field
- Object Type - Picklist Value

	A	B	C	D	E	F	G	H
1	Category	Resolution	Vault Object	Vault Field	Vault Picklist Value	Vault Picklist Label	Vault Country	Object Type
2	Picklist Dependency	Remove picklist dependency	account__v	specialty_1__v	rn__c	Registered Nurse	us__v	
3	Picklist Dependency	Remove picklist dependency	account__v	specialty_1__v	vsp__c	Veterinary Pet Surgery	us__v	
4	Picklist Dependency	Add picklist dependency	account__v	specialty_1__v	on__c	Oncology	ca__v	
5	Picklist Dependency	Add picklist dependency	account__v	specialty_1__v	30__c	Laboratory Medicine	ad__v	
6	Picklist Dependency	Add picklist dependency	account__v	specialty_1__v	a__c	Allergy	ad__v	
7	Picklist Dependency	Add picklist dependency	account__v	specialty_1__v	acu__c	Acupuncture	ad__v	
8	Picklist Dependency	Add picklist dependency	account__v	specialty_1__v	adm__c	Addiction Medicine	ad__v	
9	Picklist Dependency	Add picklist dependency	account__v	specialty_1__v	adp__c	Addiction Psychiatry	ad__v	
10	Picklist Dependency	Add picklist dependency	account__v	specialty_1__v	aes__c	Aesthetic Medicine	ad__v	

Network Field Mapping Network Reference Mapping Missing Network Ref. Mapping **Configuration Issues**

The **Summary** sheet displays a count of **Configuration Issue** types.

	A	B	C	D	E
1	Validation Date/Time	Thu, 11 Nov 2025 15:09:30 GMT			
2	Vault Name	US			
3	Vault ID	164532			
4	Domain	usvaultcrm			
5	Username	network.integration@usvaultcrm.com			
6					
7	Object	Valid	Invalid		
8	Network Mapping	0	3		
9	Network Object Mapping	10	2		
10	Network Field Mapping	140	4		
11	Network Reference Mapping	4019	0		
12					
13	Missing Reference Mappings	Counts			
14	Missing Network Codes	426			
15	- Possible Matching Values	338			
16	- No Matching Value Found	88			
17					
18	Configuration Issues	Counts			
19	- Picklist Dependency	100			
20	- Object Type - Field	5			
21	- Object Type - Picklist Value	20			
22					

Summary Network Mapping Network Object Mapping Network



Vault CRM Bridge Record Counts

25R2.1

Network Administrators can now see the number of unchanged records that were upserted to Vault CRM in a bridge job. The counts for records added and updated have also been enhanced so they more accurately reflect the data.

▼ Bridge Summary				
OBJECT TYPE	ADDS	UPDATES	ERRORS	UNCHANGED
CONTROLLED_ADDRESS	0	0	0	0
HCP	0	0	4	170
PARENTHCO	1	0	3	750
HCO	1	0	0	505
ADDRESS	0	2	37	640
LICENSE_OH_CLEANUP	0	0	0	0
HCP_ACCOUNT_IDENTIFIER	0	1	0	0
HCO_ACCOUNT_IDENTIFIER	0	16	0	0
LICENSE_DEA_CLEANUP	0	0	0	0

This enhancement is enabled by default.

Job details

After a Vault CRM Bridge job runs, the **Bridge Summary** on the Job Details page displays a count of records that were added, updated, and had errors.

The **Unchanged** column is added to the table.

Bridge Summary details

- **Adds** - Upserted records were created in Vault CRM.
- **Updates** - Upserted records were updated in Vault CRM.
- **Errors** - Records failed to be upserted to Vault CRM.

Click **Download Error Report Log** for details.

- **Unchanged** - Records were upserted to Vault CRM but did not contain changes.



Report on upserted records

Advanced reporting users can report on the data from the **Bridge Summary**. In the SQL Query Editor (**Reports**), the **Job Stats** table is updated to include unchanged records.

Example query

Use this query to understand the impact of a bridge job.

```

SELECT
    job.job_id,
    job.job_type,
    job.subscription,
    RIGHT( job.subscription, 2 ) AS "country",
    job.job_system,
    job.status,
    job.start_time,
    job_stats_summary. "hco.adds",
    job_stats_summary. "hco.updates",
    job_stats_summary. "hco.unchanged",
    job_stats_summary. "hco.errors",
    job_stats_summary. "hcp.adds",
    job_stats_summary. "hcp.updates",
    job_stats_summary. "hcp.unchanged",
    job_stats_summary. "hcp.errors",
    job_stats_summary. "address.adds",
    job_stats_summary. "address.updates",
    job_stats_summary. "address.unchanged",
    job_stats_summary. "address.errors",
    job_stats_summary. "parenthco.adds",
    job_stats_summary. "parenthco.updates",
    job_stats_summary. "parenthco.unchanged",
    job_stats_summary. "parenthco.errors"
FROM
    job LEFT JOIN (
        -- This optimized subquery now also pivots the error metrics
        SELECT
            job_id,
            -- HCO
            SUM (
                CASE
                    WHEN metric = 'hco.adds'
                    THEN counter
                    ELSE 0
                END
            ) AS "hco.adds",
            SUM (
                CASE
                    WHEN metric = 'hco.updates'
                    THEN counter
                    ELSE 0
                END
            ) AS "hco.updates",
            SUM (
                CASE

```



```
        WHEN metric = 'hco.unchanged'
        THEN counter
        ELSE 0
    END
) AS "hco.unchanged",
SUM (
    CASE
        WHEN metric = 'hco.errors'
        THEN counter
        ELSE 0
    END
) AS "hco.errors",
-- HCP
SUM (
    CASE
        WHEN metric = 'hcp.adds'
        THEN counter
        ELSE 0
    END
) AS "hcp.adds",
SUM (
    CASE
        WHEN metric = 'hcp.updates'
        THEN counter
        ELSE 0
    END
) AS "hcp.updates",
SUM (
    CASE
        WHEN metric = 'hcp.unchanged'
        THEN counter
        ELSE 0
    END
) AS "hcp.unchanged",
SUM (
    CASE
        WHEN metric = 'hcp.errors'
        THEN counter
        ELSE 0
    END
) AS "hcp.errors",
-- Address
SUM (
    CASE
        WHEN metric = 'address.adds'
        THEN counter
        ELSE 0
    END
) AS "address.adds",
SUM (
    CASE
        WHEN metric = 'address.updates'
        THEN counter
        ELSE 0
    END
) AS "address.updates",
SUM (
```



```

        CASE
            WHEN metric = 'address.unchanged'
            THEN counter
            ELSE 0
        END
    ) AS "address.unchanged",
    SUM (
        CASE
            WHEN metric = 'address.errors'
            THEN counter
            ELSE 0
        END
    ) AS "address.errors",
    -- ParenthCO
SUM (
        CASE
            WHEN metric = 'parenthco.adds'
            THEN counter
            ELSE 0
        END
    ) AS "parenthco.adds",
    SUM (
        CASE
            WHEN metric = 'parenthco.updates'
            THEN counter
            ELSE 0
        END
    ) AS "parenthco.updates",
    SUM (
        CASE
            WHEN metric = 'parenthco.unchanged'
            THEN counter
            ELSE 0
        END
    ) AS "parenthco.unchanged",
    SUM (
        CASE
            WHEN metric = 'parenthco.errors'
            THEN counter
            ELSE 0
        END
    ) AS "parenthco.errors"
FROM
    job_stats
GROUP BY
    job_id
) AS job_stats_summary
ON job.job_id = job_stats_summary.job_id
WHERE
    job.job_type = 'bridge'
    AND datediff (
        'hours',
        job.end_time,
        getdate ()) < 72

```



Example results

Sample Queries

My Recent Queries

Query Helper:

Keywords

Operators

Format Query

```
1 SELECT
2   job.job_id,
3   job.job_type,
4   job.subscription,
5   RIGHT( job.subscription, 2 ) AS "country",
6   job.job_system,
7   job.status,
8   job.start_time,
9   job_stats_summary. "hco.adds",
10  job_stats_summary. "hco.updates",
11  job_stats_summary. "hco.unchanged",
12  job_stats_summary. "hco.errors",
13  job_stats_summary. "hcp.adds",
14  job_stats_summary. "hcp.updates",
15  job_stats_summary. "hcp.unchanged",
16  job_stats_summary. "hcp.errors",
17  job_stats_summary. "address.adds",
18  job_stats_summary. "address.updates",
19  job_stats_summary. "address.unchanged",
20  job_stats_summary. "address.errors",
21  job_stats_summary. "parenthco.adds",
22  job_stats_summary. "parenthco.updates",
23  job_stats_summary. "parenthco.unchanged",
24  job_stats_summary. "parenthco.errors"
```

Query Valid

☒ Include only VALID and UNDER_REVIEW records in results.

Report Results (2 records)

Download Report

Create Custom Table

View Full Screen

Table

Chart

JOB ID	JOB TYPE	SUBSCRIPTION	COUNTRY	SYSTEM	OUTCOME	START TIME	HCO.ADDS	HCO.UPDATES	HCO.UNCHANGED	HCO.ERRORS	HCP.J
3021	bridge	vaultcrm_US	US	vault-crm	COMPLETED	2025-09-30 10:34:27	7	2	170	5	0
3024	bridge	vaultcrm_US	US	vault-crm	COMPLETED	2025-09-30 13:52:33	10	32	200	7	0

Displaying 1 to 2 of 2

Show 25 1 of 1 < >



Logs

IDENTIFY SEARCHES FROM CHINA CRM

25R2.1

Administrators can now quickly identify searches originating from China CRM from the Search Audit History.

Search Audit History

Date range

To

Search Origin

2025-08-25

2025-08-25

ChinaCRM Online X

ChinaCRM WeChat X

Get History

Reset

Choose time period...

TIMESTAMP	NETWORK USER NAME	SEARCH USER NAME	STATUS	FOUND	RETURNED	QUERY	ADDRESS QUERY	DATA TYPES	ORIGIN
2025-08-26 15:04:32 EDT	api.only.3.1@network.com	api.only.3.1@network.com	SUCCESS	400	10	*		HCO,HCP	ChinaCRM WeChat
2025-08-26 15:03:52 EDT	api.only.3.1@network.com	api.only.3.1@network.com	SUCCESS	400	10	*		HCO,HCP	ChinaCRM Online

Displaying 1 to 2 of 2

This enhancement is enabled by default in your Network instance.

Search origin

The following **Search Origin** categories have been added to the log:

- ChinaCRM Online
- ChinaCRM WeChat

View China CRM searches in the log

To filter the log for China CRM searches:

1. Open the Search Audit History (**Logs**).
2. Define the **Date range**.
3. Click the **Search Origin** field and choose one or both of the following:
 - ChinaCRM Online
 - ChinaCRM WeChat
4. Click **Get History** to view the results.



SSL CERTIFICATE UPDATE

The 2025 SSL certificates expired on October 5, 2025. They were updated on Friday, October 3, 2025.

Important: Only customers who explicitly download and install certificates on any site caches or proxy servers must update their certificates.

Download veevanetwork-2026.crt

81



```
AHUAlE5Dh/rswe+B8xkkJqgYZQH0184AgE/cmd9VTcuGdgAAAGYoOEh/wAABAMA
RjBEAiBp/S3HRAQZ9JxK4UcKvhC09T1nAut2kE6T7HnFDF7VPwIgwTfCuiruFTS2
mr2KpHwC0szriCRhaTsaPAkt9yDLQngwDQYJKoZIhvcNAQELBQADggEBABsXzQmO
vXUfw3IEYfIVdM6HmihkCbDgdNnSWCBACHhSnLK7y7CJQwhq41nf3hqNpcEfWepR
tWzUWCjRqJdpXypRUAYx+IFeRaI5l1BZMtmEgIvKMnXtuUMyN6tFOJCR6kWUADtL
hoPjjzW0GVm+x86p2+FgyJlr+W6Ih00xeNPmsuDzqWLxLZV2ZjyxW108pcA35gFv
th/kMSMsCWFKqnQfugm8VTZMSD2eYFwsaY/gcTjxDcnXI2hcy71oX0F+aASMEegd
HTGKl1dojYYO/G2Ej+FRcdEuGu4PJjJhWFG8F3kZxb7tn/H41Nq7XGJUzKtjFz95
nAW/V8nk++KP62M=
-----END CERTIFICATE-----
```

Intermediate CA certificate

Install this (DigiCertCA) CA certificate to ensure that the SSL certificate is fully trusted by the supported browsers and client computers.

Download DigiCertCA.crt

-----BEGIN CERTIFICATE-----
MIIEYDCCA7CgAwIBAgIQDPW9BitWAvR6uFAsI8zwZjANBgkqhkiG9w0BAQsFADBh
MQswCQYDVQQGEwJVUzEVMBMGA1UEChMMRGlnaUNlcnQgSW5jMRkwFwYDVQQLExB3
d3cuZGlnaWNlcnQuY29tMSAwHgYDVQQDExdEaWdpQ2VydCBHbG9iYWwgUm9vdCBH
MjAeFw0yMTAzMzAwMDAwMDBAFw0zMTAzMjkyMzU5NTlzMmFkxkCzAJBgNVBAYTA1VT
MRUwEwYDVQQKEwxEaWdpQ2VydCBHbWxmMzAxZBgNVBAMTKkR5Z2lDZXJ0IEdsb2Jh
bCBHMiBUTFMgUlNBIFNIQTi1NiAyMDIwIENBMTCASiWdQYJKoZIhvcNAQEBBQAD
ggEPADCCAQoCggEBAMz3EGJPprtjb+2QulbFbSd7ehJWivH0+dbn4Y+9lavyYEEV
cNsSAPonCrVXOFt9s1GTcZUOakGUWzUb+nv6u8W+JDD+Vu/E832X4xT1FE3LpxDy
FuqrIvAxIhFhazAmunjZlx/jfWardUSVc8is/+9dCopZQ+GssjoP80j812s3wWPc
3kbW20X+fsp9kOhRbmxQ5Ro1/tSUZUfyyIxfQTnJcVPAPooTncaQwywa8WV0yUR0J8
osicfcbUTVSvQpmbwQTCd5zWSOTOEAEagJnwQ3DPP3zr0UxJqyRwrg2C/Uaoq2Yt
zGJSqnWS+Jr6X16ysGHLHx+5fwmY06D36g39HaaECAwEAOCAYIwggF+MBIGA1Ud
EwEB/wQIMAYBAf8CAQAwHQYDVROBBYEFHSFGqMbmX9833s+9KTeqAx2+7c0XMB8G
A1UdIwQYMBaAFE4iVCAYlebjbuYP+vq5Eu0GF485MA4GA1UdDwEB/wQEAwIBhjAd
BgNVHSUEFjAUBggrBgEFBQcDAQYIKwYBBQUHAWIwdgYIKwYBBQUHAQEaJBoMCQG
CCsGAQUFBzABhhhodHRWoi8vb2NzcC5kaWdpY2VydC5jb20wQAYIKwYBBQUHMAK
NGh0dHA6Ly9jYWNlcnRzLmR5Z2lDZXJ0LmNvbS9EaWdpQ2VydEdsb2JhbFJvb3RH
Mi5jcncwQgYDVRO1fBDswOTA3oDWGm4YxaHR0cDovL2NybdMuZGlnaWNlcnQuY29t
L0R5Z2lDZXJ0R2xvYmFsUm9vdEcyLmNybDA9BgNVHSAEnjA0MASGCWCGSAGG/WwC
ATAHBgVngQwBATAIBgZngQwBAGwEwCAYGZ4EMAQICMAgBmeBDAECAzANBgkqhkiG
9w0BAQsFAAOCAQEAKPFwyyiXaZd8dP3A+iz7U6utzWX9upwGnIrXWkOH7U1Mv1+t
wcW1BSAuWdH/SvWgKtiwla3JLko716f2b4gp/DA/JIS7w7d7kwcsr4drdjPtAFVS
slme5LnQ89/nD/7d+MS5EHKBCQRfz5eeLjJ1js+aWNJXMX43AYGyZm0pGrFmCW3R
bpD0ufofARTFFXfZkAd19h6g4U5+LXUZtXMYnhIHUfoyMo5tS58aI7Dd8KvvwVVo4
chDYABPPTHPbjclqCmBaZx2vn4Ye5DUys/vZwP9BFohFrH/6j/f3IL16/RZkiMN
JCqVJUzKoZHm1Lesh3Sz8W2jmdv51b2EQJ8HmA==
-----END CERTIFICATE-----

Expiry

These certificates will expire on September 13, 2026. Before they expire, we'll switch to a new certificate and provide advanced notice in the Release Notes.



View updated certificates

After the certificates are updated, they can be viewed or downloaded by running:

```
openssl s_client -connect login.veevanetwork.com:443 -showcerts
```

API

VERSION UPDATE

25R3

The Network API is updated to v37.0.

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 v36.0 until there is a change for v37.0 that they want to apply.

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