



# **Veeva** NETWORK

Veeva Network 6.0.0.1 Release Notes

**July 2015**



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## About these Release Notes

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The Veeva Network 6.0.0.1 Release Notes describe all features introduced since Veeva Network 5.0.

## Browser requirements

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The following are the minimum browser requirements for Veeva Network 6.0.0.1:

- Internet Explorer 9
- Google Chrome 20+

## Summary

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This release includes the following key enhancements:

### GENERAL

The following general enhancements have been introduced:

- **Data load performance** – Data load times have improved for source and Veeva OpenData subscriptions.
- **Style** – Styles have been updated for consistency across the Network user interface.

### INBOX ENHANCEMENTS

The inbox has been updated with the following usability and functional enhancements:

- **Inbox design updates** – Includes an enhanced wider view for more customized information on screen at a time. Filters enable quick and easy refinement of inbox tasks for faster access to the tasks you need.
- **Inbox view customization** – Includes the ability to choose the information that appears in each column of the inbox view. Add or remove columns from the view and define the order in which they appear.
- **Additional columns and filters** – Includes the ability to add more columns and filter on additional entity and task properties.
- **View an entity's associated tasks** – You can click to view associated tasks for an entity in the **Entity** or **Parent Affiliation** column.
- **HCO/HCP preview** – Provides key information about an HCO or HCP when you hover over the provider or organization name in the task list.
- **Export from inbox** – Export a summary of the tasks in the inbox to a spreadsheet file.
- **Enhanced search** – Provides alias and phonetic search capability to improve inbox search results.
- **Filter reset** – Enables you to more easily clear filters and view the inbox without refinement.
- **General inbox updates** – Provides previous functionality, including audit history, add record, and toggle automatic refresh in a single drop down.



## DATA LINEAGE

The data lineage page has been enhanced with the following functionality:

- **Display by system** – Display only data lineage for selected systems.
- **Navigation enhancements** – Move to sections within the data lineage more quickly using a drop down list and type-ahead text entry.
- **Hide inactive children** – Choose to hide or display inactive child objects.
- **Hide empty rows** – Hide rows for fields that contain no values.
- **Show all custom keys** – Display all custom keys; not only those contributing from another source.
- **General enhancements** – Data lineage page style and behavior has been made more consistent with the Profile page, and some stylistic elements have been updated.

## PROFILES

Profiles have been enhanced with the following functionality:

- **Entity state indicators** – HCO or HCP icons include a badge indicating their record state, status, and opt-out preference.
- **Primary address** – The primary address, if specified, appears in the address section header when the address section is collapsed.
- **3-tier relationships** – Hide relationships that are not relevant for tasks on a profile.

## OPT-OUT

- **Data privacy opt-out** – Enables HCPs to opt out of their information being tracked in downstream systems.

## PRIMARY ADDRESSES

**Primary addresses** – Enables you to track single primary addresses and rules to compute the next best primary address based on source, address rank and address last modified date.

## ADDRESS VERIFICATION

The following enhancement has been made to the address verification process:

- **Detailed address verification** – The address verification process provides a more granular experience, with detailed information on verification status at the field level of an address. These details are provided when you verify addresses within a profile or an add or change request.

## SUNSHINE ACT REPORTING

The following enhancements have been made to the Sunshine Act reporting feature:

- **US compliance target subscription** – Additional information is reported, including alternate keys for entities for all compliance data types.
- **MA CRI data set** – The MA CRI compliance data set is accessible from within an entity's profile page, and can also be exported with the US compliance target subscription.



- **SLN compliance data** – The SLN compliance data now includes additional Network attributes: license subtype, best state license, and license status. These are accessible from within an entity's profile page as well as the US compliance target subscription.

#### MERGE AND UNMERGE

The merge and unmerge process has been enhanced with the following functionality:

- **Unmerge add request** – Unmerge operations can be performed on the add request for a record.
- **New unmerge functionality** – Source unmerge operations can be performed regardless of whether or not a downstream system supports unmerge.
- **Merge wizard** – System messages update you on the progress of the task, and provide links to relevant information, such as the task details, on completion.
- **Unmerge wizard** – System messages update you on the progress of the task, and provide links to relevant information, such as the original record, on completion.
- **General updates** – Enhancements have been made to merge and unmerge behavior, and are detailed in the general updates section for this topic.

#### WORKFLOW

The workflow process has been enhanced with the following functionality:

- **Add child objects to a change request** – You can add child objects to a change request that are not part of the original request.
- **Task behavior** – Data change requests rejected by a data steward require resolution notes.

#### DATA MODEL

The following enhancement has been added for the data model pages:

- **Data model export** – Enables administrators to export complete details on the data model, including field names and labels, field attributes such as length, key information, and applicable countries.

#### REPORTS

- **View pending change requests report** – Enables you to view information, through the Aging Report, on data requests that are older than 1, 3, and 5 days. You can update the report to run for a particular time period, on a schedule, and be shared with other users.
- **Report viewer enhancements** – View reports in full screen, hover over **Export** button for additional information, and stylistic enhancements for consistency.
- **View pending tasks** – View the list of pending tasks sent to master and local tasks by country.

#### API

- **Data privacy flag** – Determines visibility of fields in opted-out records when using the Retrieve Fields Metadata and Retrieve Field Details Metadata API.
- **Include parent HCOs in search** – Enables you to include all related parent HCOs in the entities found in supplemental results.





- **API permissions** – API documentation includes information on permissions (based on user role) required to use each API.

#### ONLINE HELP

The online help has been completely redesigned for this release, including the overall style and experience. A glossary and the release notes have been added to the content available in the help.

#### DATA GOVERNANCE

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



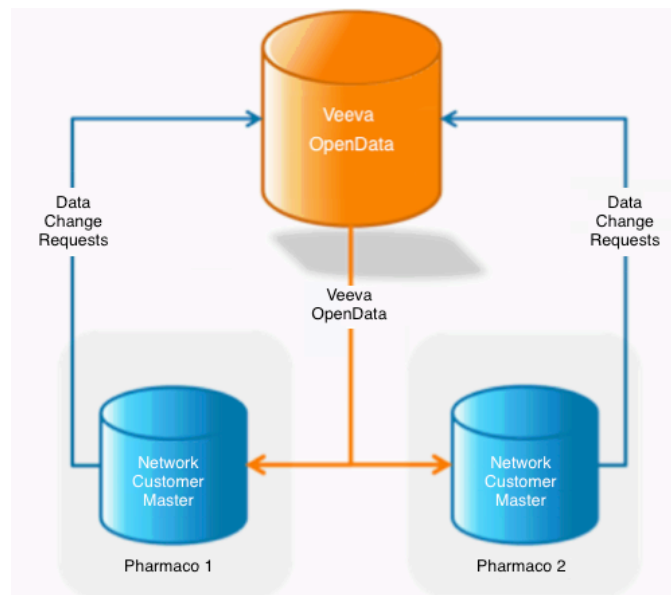
## Introduction

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Veeva Network includes Network Customer Master, and for applicable countries, Veeva OpenData Customer Data.

*Veeva OpenData* provides identity, demographic, and licensure data about Healthcare Professionals and Healthcare Organizations.

*Network Customer Master* is a SaaS Master Data Management (MDM) application that is populated with a subset of the data from Veeva OpenData, according to each pharmaco's contract with Veeva.



## Network Customer Master

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Veeva Network Customer Master is a multi-tenant SaaS Master Data Management (MDM) application. Each pharmaco that subscribes to Veeva Network has its own Network Customer Master tenant (often referred to as a *Network org* similar in concept to a Veeva CRM or Salesforce.com org).

Each Network org comes pre-populated with data from the Veeva OpenData databases to which the pharmaco has subscribed. Veeva Network automatically keeps the data in each production Network org up-to-date and in sync with the data in Veeva OpenData.

Pharmacos can also load their own data into their Network org and match and merge it with the Veeva OpenData data. Veeva is responsible for stewarding the quality of the Veeva-provided data as well as any new records added in the Network org that can be shared with Veeva OpenData.

Records that do not match Veeva records will be loaded as customer-stewarded records and updates on those records will not be shared with Veeva OpenData.



## General

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For a target subscription set to **Active only**, records where the record state is VALID or UNDER REVIEW are now properly exported.

### STYLES

The look and feel has been updated for consistency through the Network screens, including the Admin console.

### PERFORMANCE ENHANCEMENTS

This release introduces enhancements to data loading that improve times for data loads from source subscriptions and Veeva OpenData subscriptions.

## Inbox enhancements

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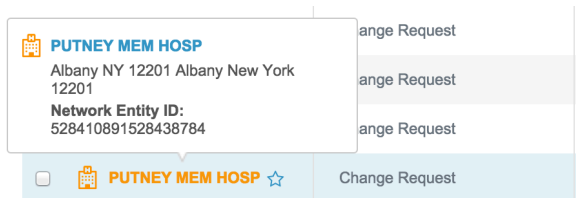
Inbox performance has been improved through faster loading times.

### INBOX REDESIGN

When you log into Network, the inbox now appears with more detailed information and filters. By default, each task displays information that was displayed in the previous version of the inbox, including the HCO or HCP name, the type and summary of the task, the assignee, and the service time.

Note that administrators and data stewards now have a Home page with additional functionality (for example, Starred items) that appeared in the previous version of the inbox.

In the enhanced inbox view, when you hover over an HCO or HCP name, summary information appears for that entity.





You can also customize the inbox to display additional (or fewer) columns and turn off automatic refresh.

Countries ▾ Task Status ▼ Source Systems ▾  View Task Sort by Time ⚙

SUBJECT	TYPE	SUMMARY	ASSIGNEE	SERVICE TIME
<input type="checkbox"/> <input type="text" value="Q Keyword"/>	<input type="text" value="Select options"/>	<input type="text" value="Q Keyword"/>	<input type="text" value="1 item selected"/>	<input type="text" value="Hrs"/> - <input type="text" value="Hrs"/>
<input type="checkbox"/> OZLEM PALA ☆	Change Request	No Value	data.steward.2.1@network....	1991 hours
<input type="checkbox"/> MICHAEL LOONEY ☆	Change Request	Change Licensing Authority...	data.steward.2.1@network....	1990 hours
<input type="checkbox"/> VIRENDRA SINGH ☆	Change Request	Change Licensing Authority...	data.steward.2.1@network....	1972 hours
<input type="checkbox"/> PUTNEY MEM HOSP ☆	Change Request	Change Major Class of Tra...	data.steward.2.1@network....	1919 hours
<input type="checkbox"/> NAVEEN ACHAR ☆	Change Request	Change Degree 2	No Value	1821 hours

### FILTER THE INBOX BY COUNTRY, SOURCE, AND STATUS

Top level filters enable you to refine the inbox by country, task status, and source system, while additional filters enable you to search the inbox based on a name or the request summary, and display particular task types, assignees, or tasks within a defined service time.

To filter on any of these parameters, click the associated filter and select the attributes to display.

Countries ▾ Task Status ▼ Source Systems ▾

Troy M

Troy M

Troy M

Troy M

John C

All

Processing (0)

Pending Review (17)

Cancelled (0)

Accepted (43)

Denied (18)

Partially accepted (14)

Matched (4)

Not Matched (0)

Request

Request

Request

Request

Request

Each attribute displays the number of entries in the inbox that match that value.

**Note:** If the **Source System** column is added to your inbox, the filter in the column may become out of sync with the filter at the top of the inbox.

### SEARCH, FILTER, AND REFINE INBOX RESULTS

Additional filters and fields enable you to refine the inbox based on task type and assignee, search by HCO or HCP name and the summary description of the task, and define the maximum and minimum service times to display.



*Search the inbox*

To search the inbox, type a value in either the **SUBJECT** or **SUMMARY** columns. The **SUBJECT** column search value refines the results based on HCP or HCO names that contain the search value.

SUBJECT		TYPE
<input type="checkbox"/>	<input type="text" value="hosp"/>	Select options
<input type="checkbox"/>	PUTNEY MEM HOSP ☆	Change Request
<input type="checkbox"/>	SLA HOSPITAL ☆	Change Request
Displaying 1 to 2 of 2 (0 Selected)		

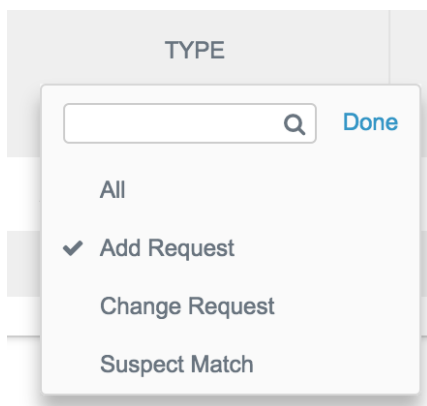
The **SUMMARY** column search value refines the results based on field names affected by the change request that contain the search value.

SUBJECT	TYPE	SUMMARY
<input type="checkbox"/>	<input type="text" value="Keyword"/>	<input type="text" value="name"/>
VLADIMIR KALAS ☆	Change Request	Change Middle Name
ALFRED FARAH ☆	Change Request	Change Middle Name
<input type="checkbox"/>	MICHAEL BURKE ☆	Change First Name
Displaying 1 to 3 of 3 (0 Selected)		

To clear the refined results and view all of the inbox tasks, click the **x** in the right side of the search field.

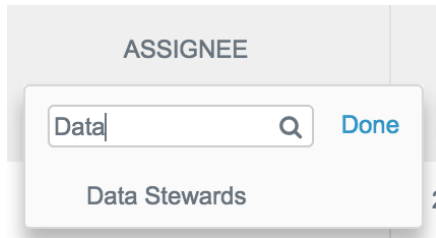
*Refine the inbox by task type and assignee*

To refine the inbox by task type or assignee, click the drop down list in the **TYPE** or **ASSIGNEE** columns and select attributes to filter on and then click **Done**.





You can also type in the drop down field to narrow the list of attributes, if there are many.



Note that you can select multiple types or assignees at a time in these lists.

*Refine the inbox by service time*

By default, all tasks are sorted in descending order by service time. To sort tasks in ascending order, click the **Sort by Time** button at the top right of the inbox.

To refine the inbox by specific service times, type a value in the minimum and maximum fields in the **SERVICE TIME** column and press the Enter key.

ASSIGNEE	SERVICE TIME
ons	100 - 600
	505 hours
.2.1@networ...	101 hours

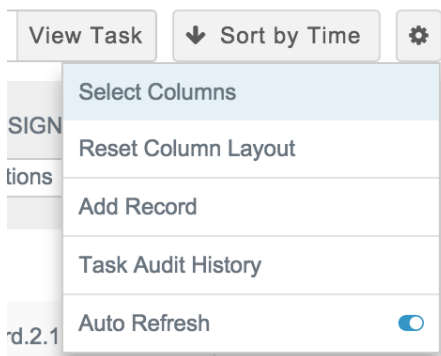
**CUSTOMIZE THE INBOX**

You can display additional columns or remove existing columns from the inbox view, and set the refresh behavior.

Child objects that you can add to the inbox include a summary field containing the full address and parent affiliation for each object.

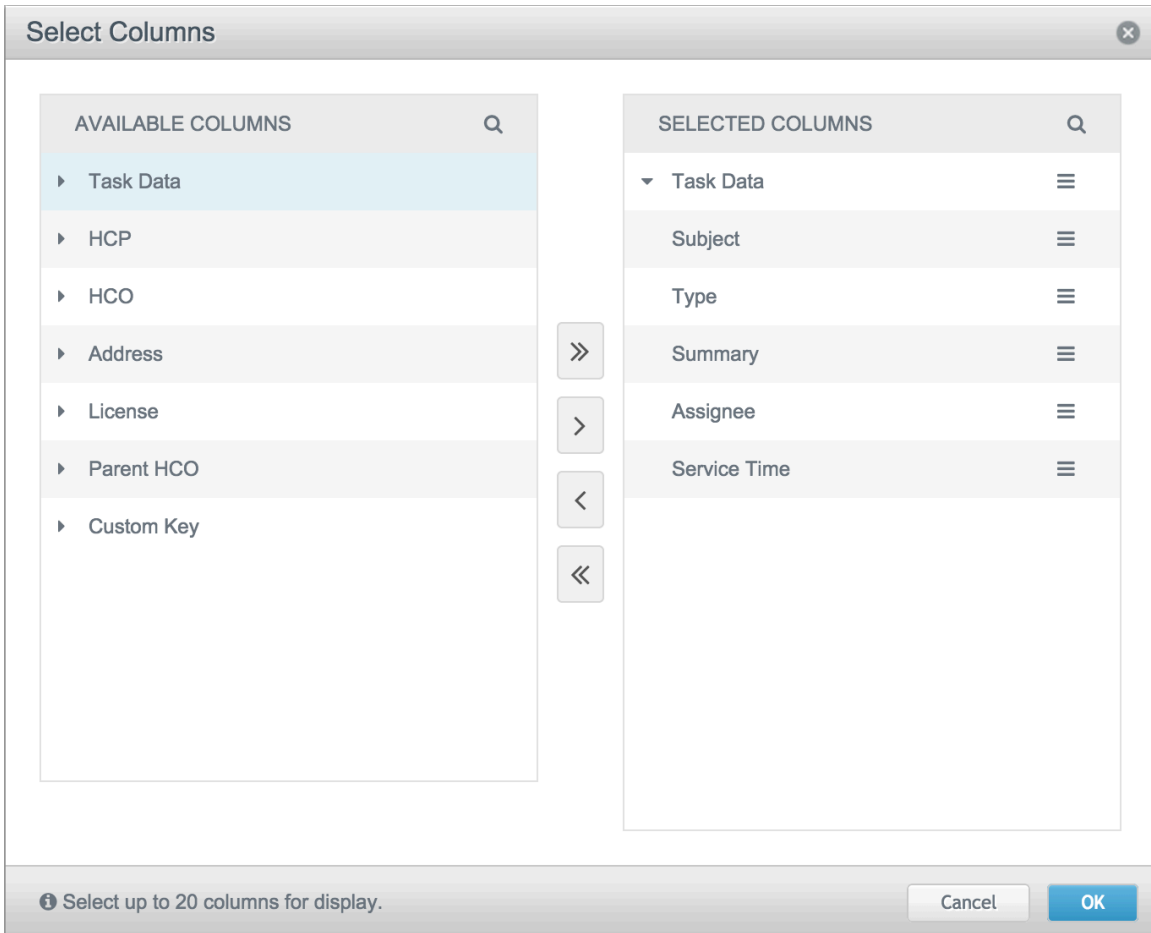
*Display or remove columns*

To set the columns that appear in the inbox, click the cog at the top right of the inbox and select **Select Columns**.





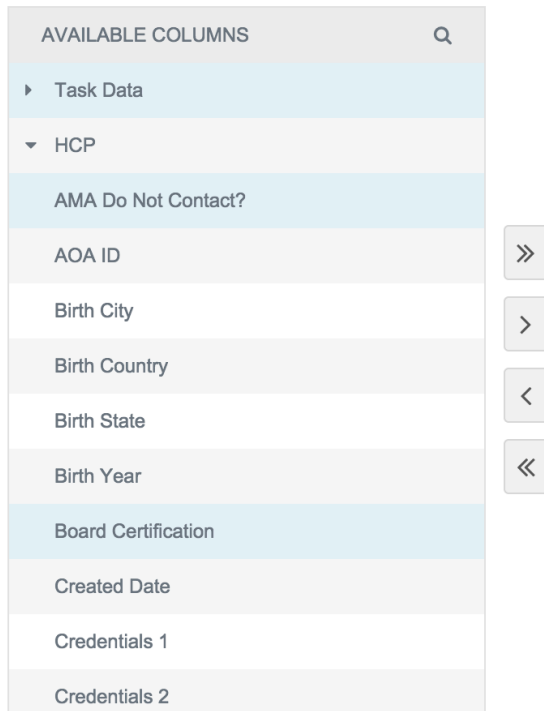
The Select Columns dialog enables you to add available columns to the inbox or remove selected columns from the inbox. Within each section, you can search available or selected columns for the specific value you want to display in the inbox. You can add up to 20 columns to the inbox.



To add columns to the view, expand a heading in the AVAILABLE COLUMNS pane and select the attributes you want to add to the view. Note that you can select multiple items by pressing the Alt key when selecting each item.



You can select an expandable heading to include all of its subentries in the view. When you've selected all of the entries to include, click the > between the panes.



Note that once the **SELECTED COLUMNS** list reaches 20 entries, additional entries cannot be moved to that pane.

Depending on how many columns appear in the inbox, scroll indicators will appear in the view.

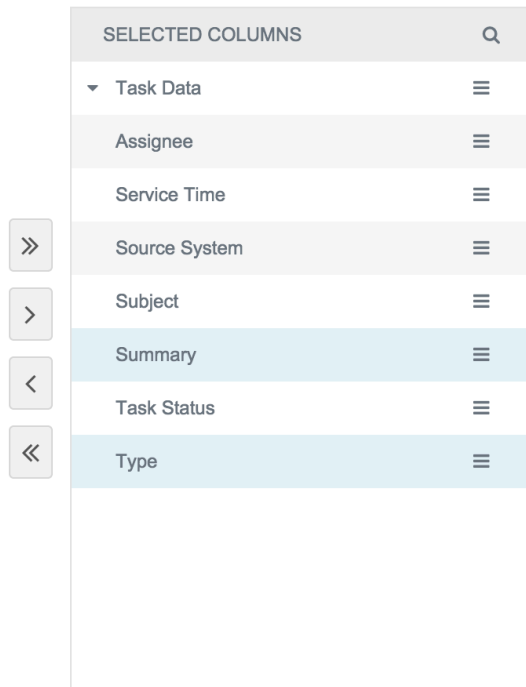
	No Value	Toronto	No Value	Canada
	No Value	Toronto	No Value	Canada
	No Value	No Value	No Value	No Value
	Albany-Schenectady-Troy, ...	Albany	No Value	United States
	Albany-Schenectady-Troy, ...	Albany	No Value	United States
	No Value	No Value	No Value	No Value

To remove columns from the view, expand a heading in the **SELECTED COLUMNS** pane and select the attributes you want to add to the view. Note that you can select multiple items by pressing the Alt key when selecting each item.





You can select an expandable heading to include all of its subentries in the view. When you've selected all of the entries to include, click the < between the panes.



You can add or remove all entries from one pane or the other at once by clicking the << or >> buttons between panes. Note that the right pane must include at least one entry.

### *Move columns*

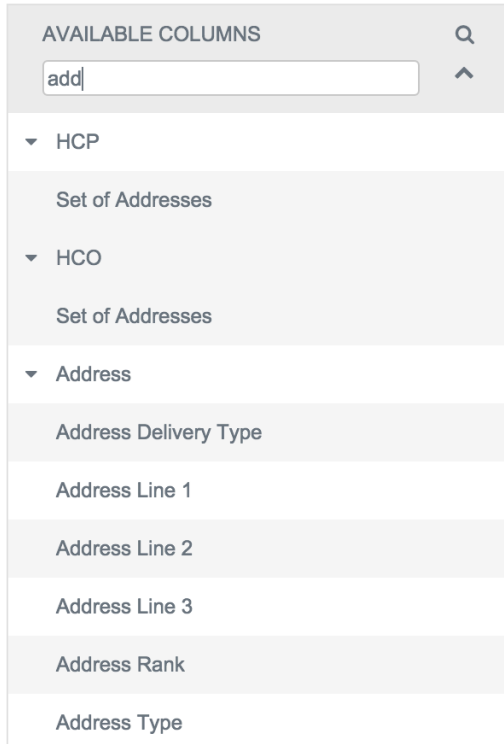
To display columns in a different order than they appear in the current inbox view, in the Select Columns dialog, click a handle to the right of the entry and drag the entry to another position in the list.

**Note:** Entries belonging to the same type (for example, Address) must be grouped together.



### Search columns

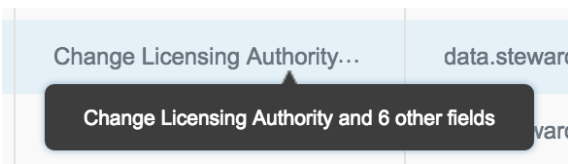
To search either columns list in the Select Columns dialog, click the magnifying glass icon within the column header and type a search value. The list updates automatically according to the text you type.



### Resize columns

To resize columns in the inbox, click the vertical divider between column headings and drag the divider left or right.

Note that for values that are truncated within a column, you can hover over the value to see it in full.

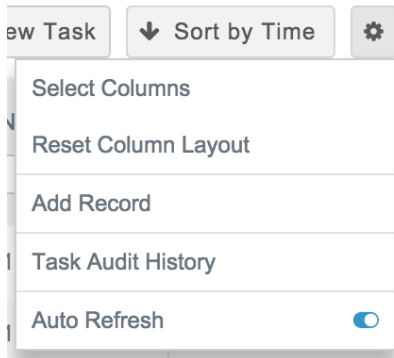


**Note:** Column resizing may affect adjacent columns in Internet Explorer 10. This behavior will be fixed in a future release.



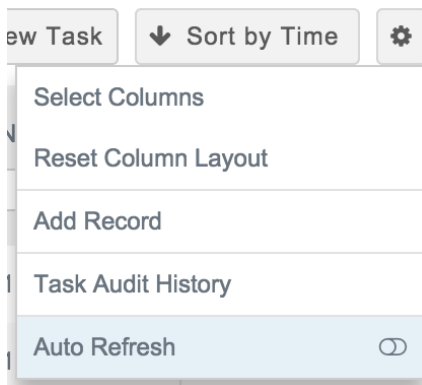
### *Reset the inbox view*

To reset the inbox back to its default column display, click the cog icon at the top right of the inbox and select **Reset Column Layout**.



### *Set inbox refresh behavior*

By default, the inbox refreshes its content automatically. To turn automatic refresh off, click the cog icon at the top right of the inbox and select **Auto Refresh**.



Note that when the Auto Refresh option is on (default) shading appears to the left of the switch icon.

## GENERAL INBOX UPDATES

In addition to the functional and design changes in the inbox, some existing functionality has been moved or is not accessible directly from the inbox.

### *Adding records*

To add a record, click the cog icon at the top right of the inbox and select **Add Record**.

### *Task audit history*

To view the task audit history, click the cog icon at the top right of the inbox and select **Task Audit History**.

### *Go to task ID*

The search box for finding a task by its ID number appears at the top right of the inbox.




### Starred items

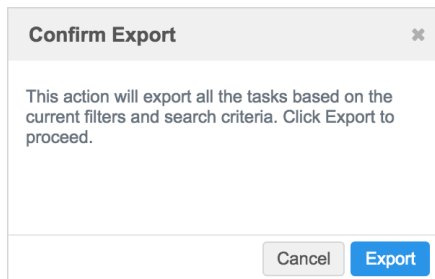
To view starred items, click the **HOME** tab at the top right of the Network UI and then select **Starred** on the Network home page.

**Note:** Starring items does not currently work from the parent affiliation and subject columns. An inbox refresh removes stars from starred items.

### EXPORT FROM INBOX

Data stewards can export a summary of all tasks from the inbox to a CSV file. An administrator must enable this functionality.

To export the current list of tasks according to visible columns (or a subset of the tasks, if filters are set), click the export button  at the top right of the inbox. Click **Export** in the **Confirm Export** dialog.



A system message at the top of the page indicates that the operation is in progress. Once it completes, a .zip file containing the spreadsheet downloads to your local file system. The following is an example of the output.

	A	B	C	D	E	F	G	H	I	J
1	TASK ID	ENTITY	TYPE	SUMMARY	ASSIGNEE	SERVICE TIME	RECORD STATE (hcp.record_state_v)			
2	641682989230588000	Departments of Pat	Change Request	Change State and 10 o	customer1.steward@id	1100.0 hours				
3	641685594010813000	Departments of Pat	Change Request	Change Primary Addres	customer1.steward@id	1100.0 hours				
4	644379416733942000	James Johnston	Suspect Match	2 suspected matches	customer1.steward@id	1011.0 hours	Valid			
5	644382183657571000	James Johnston	Suspect Match	2 suspected matches	customer1.steward@id	1011.0 hours	Valid			
6	644578252286854000	Flux Pavillon	Suspect Match	2 suspected matches	customer1.steward@id	1004.0 hours	Valid			
7	646349304935482000	Departments of Pat	Suspect Match	3 suspected matches	customer1.steward@id	945.0 hours				
8	646547858194957000	Departments of Pat	Suspect Match	1 suspected matches	customer1.steward@id	939.0 hours				
9	650226315919623000	Pengxin Lin	Change Request	Change Degree 2 and 8	customer1.steward@id	817.0 hours	Valid			
10	650236161452672000	Flux Pavillon	Suspect Match	1 suspected matches	customer1.steward@id	817.0 hours	Valid			
11	650694734473331000	Saint Peters Hospita	Change Request	Change Major Class of	Trade and 8 other fields	802.0 hours				
12	650876095767249000	Aamir Ahmad	Suspect Match	1 suspected matches	customer1.steward@id	796.0 hours	Valid			
13	650882179009610000	Flux Pavillon	Suspect Match	3 suspected matches	customer1.steward@id	795.0 hours	Valid			
14	650926147336406000	Aamir Ahmad	Suspect Match	2 suspected matches	customer1.steward@id	794.0 hours	Valid			
15	651065796495148000	Aamir Ahmad	Change Request	Change Expiration Date	customer1.steward@id	789.0 hours	Valid			
16	656647321018172000	Aamir Ahmad	Change Request	Change Degree 1 and 3	other fields	604.0 hours	Valid			
17	661821915727397000	Lily Allen	Change Request	Change KOL? and 3 oth	customer1.steward@id	433.0 hours	Valid			
18	669752578954757000	Jane Miranda	Add Request	HCP	customer1.steward@id	170.0 hours				
19										
20										
21										
22										



### ENABLING EXPORT FROM INBOX

Administrators can enable data stewards to export a summary of all tasks from the inbox to a spreadsheet. This functionality must be enabled from the admin console.

From the admin console, select **Users** and click **Inbox Task Groups** to the left. On the Inbox Task Groups page, select a task group.

## Inbox Task Groups

[Add New Group](#)

NAME ▲	COUNTRY ◆	DESCRIPTION ◆	DEFAULT ◆
<a href="#">Data Loading Jobs</a>		Data Loading Jobs Group (System managed group)	False
<a href="#">Data Steward JP</a>	Japan	JP	False
<a href="#">Data Stewards</a>	United States	Data Steward Group (System managed group)	True
<a href="#">Data Stewards AR</a>	Argentina	Data Steward Group for Argentina	False
<a href="#">Data Stewards UK</a>	United Kingdom	Data Steward Group UK	False

On the page for the task group, select the **True** radio button for the **Inbox Export** option. Repeat these steps for each task group; all data steward task groups must have inbox export enabled for the option to appear in the inbox.

## Data Stewards

[Cancel](#) [Save](#)

▼ **Details**

Name

Description

Default (When Creating New User)  True  False

Default routing group  True  False

Inbox Export  True  False

▼ **Routing of Add/Change Requests**

Country

**HCP Routing** All Add/Change Requests for HCPs from selected country will be routed to this group. By [adding a filter](#) you can specify which Add/Change Requests will be sent to this group.

**HCO Routing** All Add/Change Requests for HCOs from selected country will be routed to this group. By [adding a filter](#) you can specify which Add/Change Requests will be sent to this group.

### INBOX SEARCH

Inbox search now enables you to search on any fields in a column, regardless of whether or not they were changed in the data change request. You can also now search on both task and object (HCP or HCO) fields.



Text search fields now enable alias matching and phonetic search. Name fields, for example, use alias matching to return similar results (such as Rob or Bob), and other fields use phonetic matching to provide results for similar input such as Montreal or Montréal.

### ADDITIONAL COLUMNS

Data stewards can now make additional columns visible in the inbox, enabling you to filter on additional task properties, including the ability to filter by the following:

- HCP changes
- Address changes
- Primary department changes
- License changes
- Parent HCO changes
- Entity type

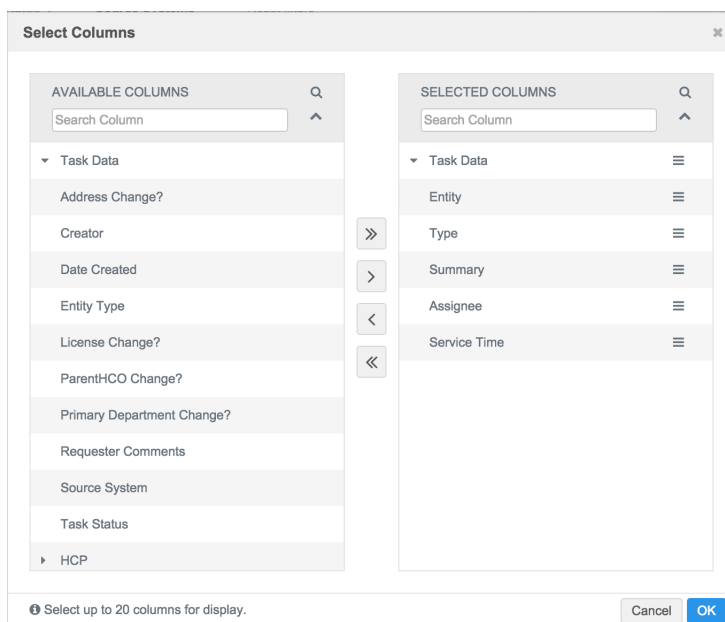
For example, you can find all change requests for the license field and assign them to a particular data steward for processing.

Columns have also been added to enable you to view the following information in the inbox:

- Request creator
- Requestor comments

Before you can filter on additional properties you must add relevant columns to the inbox by clicking the gear icon at the top right of the inbox and selecting **Select Columns**.

In the Select Columns dialog, select the columns you want to add from the **AVAILABLE COLUMNS** pane and click the > symbol between the panes. Click and drag the handle of the new column to order it according to your preference, and click **OK** to save your configuration and close the dialog.





If the new column is not in view, hover over the arrow icon to the right to scroll to it. For columns that include a filter, you can click the **Select options** drop down list to refine the inbox based on values in that column.

	SERVICE TIME	ADDRESS CHANGE?
	Servi - Serv	<input type="text"/> Q Done <input type="checkbox"/> True <input type="checkbox"/> False
reevanetwo...	335 hours	
reevanetwo...	329 hours	
reevanetwo...	329 hours	True
etwork.com	242 hours	False
reevanetwo...	240 hours	False

### Scrolling the inbox

You can now hover over the arrow icons at either side of the inbox to scroll left or right. If you click the arrow icons the view navigates all the way to the left or right of the inbox.

### Child objects

Inactive or invalid child objects (addresses, licenses, or parent HCOs) do not appear in the inbox refinement options unless those objects are updated in the change request

The address, license, or parent HCO that appears in the inbox depends on the following:

1. Child objects that match the applied filters
2. Child objects in the data change request
3. Highest ranking or preferred child objects

### VIEW ASSOCIATED TASKS

You can view all tasks related to an entity in the inbox by hovering over the entity to see its business card and clicking **View associated tasks**. This option is available for entities in the **Entity** column and the **Parent Affiliation** column (if added to the inbox).

The screenshot shows a user profile card for James Johnston. The card includes a name, a person icon, and a 'Network Entity ID: 641411069734028289'. Below the card are two buttons: 'Go to task' and 'View associated tasks'. The card is overlaid on a table row for James Johnston, which has a 'Suspect Match' status. In the background, there are 'Systems' and 'Reset filters' options, and a 'TYPE' column header with a 'Select options' dropdown menu.



This filters the inbox by that entity’s Network ID, showing only tasks for that entity.

ENTITY	TYPE	SUMMARY	ASSIGNEE	SERVICE TIME
<input type="checkbox"/> <input type="text" value="641411069734028289"/>	<input type="text" value="Select options"/>	<input type="text" value="Keyword"/>	<input type="text" value="1 item selected"/>	<input type="text" value="Hrs"/> - <input type="text" value="Hrs"/>
<input type="checkbox"/> <b>James Johnston</b> ★	Suspect Match	2 suspected matches	customer1.steward...	1890 hours
<input type="checkbox"/> <b>James Johnston</b> ★	Suspect Match	2 suspected matches	customer1.steward...	1890 hours

Displaying 1 to 2 of 2 (0 Selected) Show 10 1 of 1 < >

### FILTER ON DATE FIELDS

You can now filter on information in columns that use the date field, providing the columns have been added to the inbox.

For a relevant column, for example **Date Created**, click the calendar buttons and select start and end dates to filter on. You can also type dates in the format yyyy-mm-dd hh:mm:ss.

### FILTER ON REFERENCE FIELDS

When you filter on reference fields, selected options now appear at the top of the filter list. The list now includes the **Clear selected options** link to clear the filter for the column.

**ACADEMIC TITLE**

Q Done

[Clear selected options](#)

- Assistant Manager
- Chief of Drug Information
- Assistant Chief of Staff
- Assistant Department Chair
- Assistant Hospital/Clinic Director
- Assistant Head Physician

Reference values are filtered based on the countries specified in the user’s data visibility profiles to ensure that data stewards only see reference codes for their country.

### RESET INBOX FILTERS

You can now more easily reset inbox filters by clicking the Reset filters link at the top of the inbox. This clears all filters applied to the inbox and displays all inbox entries.

**Source Systems** ▾ [Reset filters](#)

SERVICE TIME	ADDRESS CHANGE?
<input type="text" value="Servi"/> - <input type="text" value="Serv"/>	<input type="text" value="1 item selected"/>
329 hours	True





## Data lineage enhancements

The following general enhancements have been applied to the data lineage page for consistency and usability.

Fields within a profile that do not have a value in the customer master record are no longer listed in the Data Lineage page as a blank row. This update enables you to more easily view meaningful information and minimizes scrolling within the Data Lineage page.

James Jones ★

**Primary Information**

Name: James Jones

Network Entity ID: 644576966548128769      HCP Type: Prescriber

Degree 1: No Value      Degree 2: No Value

Primary Specialty: No Value

Other Specialties: No Value

Status: Undetermined      Record State: Valid

Gender: No Value      Place of Employment: No Value

Major Professional Activity: No Value      Type of Practice: Administration

AMA Do Not Contact?: No/False

PDRP Opt Out?: No/False      PDRP Opt Out Date: No Value

**Data Lineage** Unmerge

Jump to a section:       Customer Master Record       change\_request

HCP: 644576966548128769

**Job Details**

Last Updated: 2015-06-15 19:49:31

**Primary Information**

First Name	James	James
Last Name	Jones	Jones
Network Entity ID	644576966548128769	644576966548128769
HCP Type	Prescriber	Prescriber
Status	Undetermined	Undetermined
Type of Practice	Administration	Administration
AMA Do Not Contact?	No/False	No/False
PDRP Opt Out?	No/False	No/False

### Custom keys

All custom keys for HCPs and HCOs are now displayed on the Data Lineage page. Previously, only contributing keys showed up for each applicable column, and additional keys from a single source were not displayed.

From within a profile, you can view these additional keys by clicking Data Lineage to the right, and scrolling to the **External Identifiers** section.

**Data Lineage** Unmerge

1 - 3 of 5

Jump to a section:

cs\_import

**BBM**

change\_request

Customer Master Record

HCP: 641411069734028289

HCP: 6755674873564546

HCP: 637231347852641281

**External Identifiers**

Custom Key 1	WORKFLOW__v:DCRID__v: 676111311372813312		
Custom Key 2	CUSTOMER__v/3/change_request:HCP:636944181046019072		
Custom Key 3	BBM:HCP:6755674873564546	BBM:HCP:6755674873564546	[object Object]
Custom Key 4	MASTER__v:HCP:641411069734028289	MASTER__v:HCP:641411069734028289	
Custom Key 5	CUSTOMER__v/3/change_request:HCP:676111332663100417		
Custom Key 6	CUSTOMER__v/3/change_request:HCP:637231347852641281		CUSTOMER__v/3/change_request:HCP:637231347852641281
Custom Key 7	WORKFLOW__v:DCRID__v: 637231290298401792		WORKFLOW__v:DCRID__v: 637231290298401792



### Date and time display

The date and time format on the data lineage page has been made consistent with the format used on the profile page.

### Child object headings

You can expand or collapse child object detail by clicking the arrow icon to the right of the object heading. By default, sections are collapsed and summary information appears.

Addresses		
PROFESSIONAL ▾	47 New Scotland Ave Albany New York 12208-3412 US	✔ 47 New Scotland Ave Albany New York 12208-3412 US

### Address display

Addresses now appear by type (for example, Professional) on the Data Lineage page, consistent with their profile page display.

### Download from Veeva OpenData

An icon appears in place of the former **Sync with Master** button. This functionality enables you to download the record for export and use in downstream systems, such as CRM.

## Data Lineage

Jump to a section ▾

**Customer Master Record**

Sync with Master

  
cs\_import   
HCP  
601610968526488577

---

**Job Details**

Last Updated	2015-05-05 17:24:44
--------------	---------------------

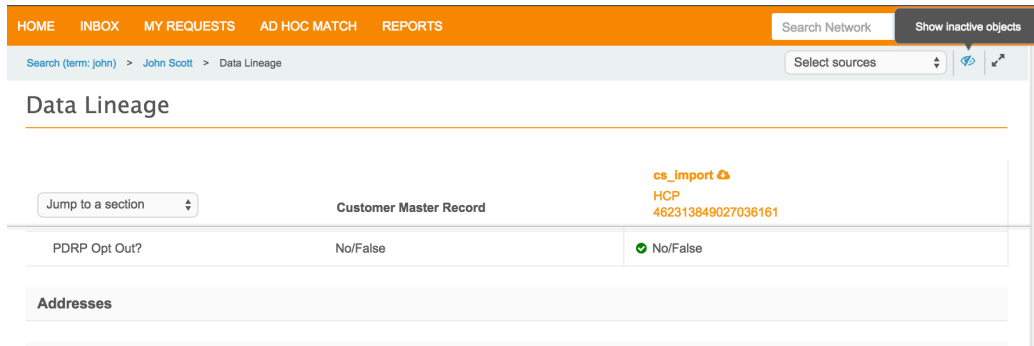
### Inactive child objects display

Inactive child objects now appear grayed out in the data lineage page.

Addresses		
PROFESSIONAL ^	47 New Scotland Ave Albany New York 12208 US	47 New Scotland Ave Albany New York 12208 US
Address Type	Professional	Professional
Address Line 1	47 New Scotland Ave	47 New Scotland Ave
City	Albany	Albany

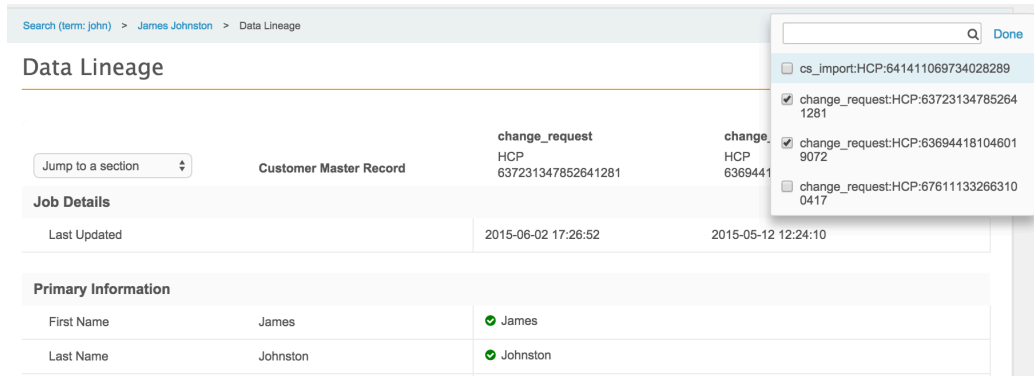


You can choose to hide inactive child objects by clicking the eye icon at the top right of the page.



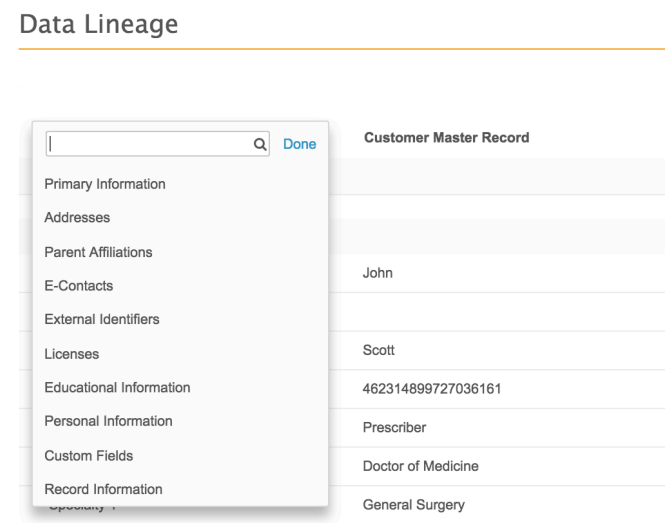
### VIEW SPECIFIC SOURCES

You can select one or more sources to view on the Data Lineage using the drop down list at the top right of the page. Select the check boxes for the sources you want to view and click **Done**. You can also begin typing in the text field to limit the list of sources as you type.



### NAVIGATION TO SPECIFIC SECTIONS

You can quickly jump to a specific section of the Data Lineage page by selecting that section in the drop down list at the top left of the page. You can also begin typing to have your selection autocomplete as you type.





## Profiles

Fields defined using rule expressions (rather than default values) now appear in a profile; fields using rules previously did not appear.

### 2/3-TIER HIERARCHY MODEL

Currently, Network instances in China use either a 3-tier hierarchy model or a 2-tier hierarchy model.

A *3-tier* model is one in which HCPs are affiliated to department HCOs, which in turn are affiliated to hospital HCO entities.

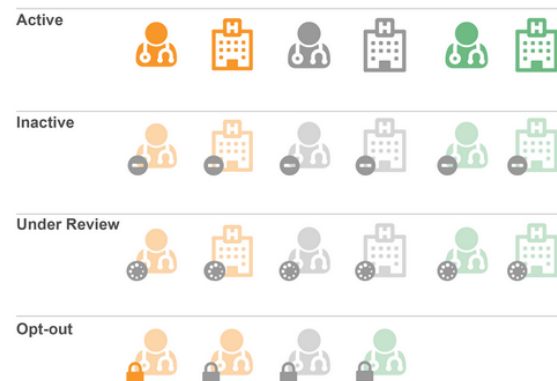
A *2-tier* model is one in which HCPs are directly affiliated to hospitals. This model does not include the departmental level HCO in CRM or Network hierarchical data.

For Network instances that are enabled for a 3-tier hierarchy model, HCO relationships that are not considered relevant are hidden.

The 2/3 tier feature ensures entities will have unique primary relationships for both the 2 and 3 tier hierarchy models.

### ENTITY INDICATOR BADGES

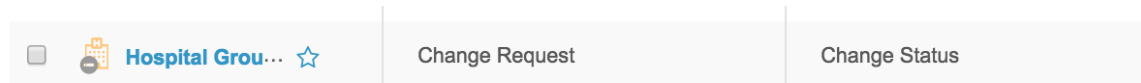
Indicator badges now also appear on an HCP or HCO profile from search, the profile page, the inbox, My Request, or Suspect Match pages, and in the profile of the parent HCO. Badges appear for the following record states:



Note that the customer-mastered HCP icon is displayed in green instead of grey if the locale is set to China for a user.

The following are examples of the entity status indicator in various usages. Entity indicator badges introduced in the previous release appear similarly in the same places.

In the inbox:








From search results:



### Search results for: burns

Add Record



Displaying 1 to 2 of 2 (0 Selected)

- 


 **Burns Nikolic** ★  
 Paediatrics  
 2525 Main St Albany NY 22251
- 

 **Bob Burns**  
 Psychiatry  
 34 Pines Road Albany NY 22452
 


On the My Requests page:

ENTITY	TYPE	DESCRIPTION
 <b>Tessy Betsy</b>	Add	New record added via Network portal.
 <b>Main St Hospital</b>	Add	New record added via Network portal.

In the business card for a profile:




**William Joh**  
 Network Entity ID:  
 462313900256265220

Go to task
View associated tasks

Change Request

Change Request

Request


**William Joh** ★
Change Request



## PRIMARY ADDRESS

If specified, the primary address now appears in the address section header when the address section is collapsed. This enables you to see which address is set as primary without expanding the **Addresses** section.

Benjamin Schaefer
★

Cancel
Apply

---

**Major Professional Activity** Office Based Practice

**PDRP Opt Out?** Yes/True

**Type of Practice** Direct Patient Care

**AMA Do Not Contact?** Yes/True

**PDRP Opt Out Date** 2007-03-22

▼ **Addresses**

**Professional** 2 Palisades Dr Albany New York 12205-1438 US

**Primary Address**  ↻

Add Address

▼ **Parent Affiliations**

No Parent Affiliations defined. [Click here](#) to add a Parent Affiliation.

▼ **E-Contacts**

## Data privacy opt out

This release introduces data privacy for opted-out HCPs in customer instances for Great Britain, Ireland, France, Spain, Italy, and Germany. This functionality ensures data privacy for opted-out HCPs to satisfy regional regulatory requirements.

Records that are opted-out by Veeva OpenData data stewards for these regions will not appear and cannot be accessed in downstream systems, including the customer instance, CRM, or by API calls.

In addition to not appearing in downstream record searches, opted-out records cannot be updated or otherwise managed through the data change request process.

A separate opt-out flag has been implemented for instances in Australia as well, but is informational; downstream systems can still view opted-out record information.

The data privacy opt-out functionality is available for other regions through the use of a custom opt-out field. This functionality must be enabled by Veeva Support.



## Primary address

Administrators can now create a primary address custom field so that data stewards can manage the relationship between multiple addresses on a profile.

Data stewards update the primary address from either an add or a change request, by selecting a value from the **Primary Address** drop down list.

▼ **Addresses**

<b>Professional</b>	<p>Address Type Professional</p>		<p>Record State Under Review <span style="color: red;">⚠</span></p>
	<p>Address Line 1 * <input type="text" value="1023 Centre St"/></p>	↻	<p>Address Line 2 <input type="text"/></p>
	<p>City * <input type="text" value="Albany"/></p>	↻	<p>State <input type="text" value="New York"/></p>
	<p>Zip Code 12207-2425</p>		<p>Country United States</p>
	<p>Status Active</p>		<p>Address Verification Status <span style="color: green;">✔ Verified</span></p>
	<p>Address Rank 1</p>		<p><b>Phone</b> <a href="#">Add Phone</a></p>
	<p><b>Fax</b> <a href="#">Add Fax</a></p>		<p>Primary Address  <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <p>Yes/True ▲</p> <input style="width: 100%; border: none;" type="text"/> <p>-</p> <p>No/False</p> <p>Unknown/No response</p> <p>Yes/True</p> </div> <span style="float: right;">↻</span> </p>

---

<b>Professional</b>	<p>Address Type Professional</p>		
	<p>Address Line 1 * <input type="text" value="540 E Canfield St"/></p>		<p>Address Line 2 No Value</p>

Depending on source rankings and survivorship settings, when you set a primary address to No/False, the next non-primary address is automatically set as the primary address.

### Enabling primary address selection

Before data stewards can manage primary addresses, an administrator must create and enable the primary field.

In the admin console, on the Data Model page, click the **Create Custom Field** button. On the Create Custom Field page, type a name for the field and select Primary Address in the Type drop down list.



## Create Custom Field

Cancel

Save

### ▼ Properties

Name	<input type="text" value="Primary_Address"/> <small>_c</small> ?	Effective Version	N/A ?
Type	<input type="text" value="Primary Address"/> ?	Veeva Mastered?	<input type="checkbox"/>
Enabled?	<input checked="" type="checkbox"/>	Change Procedure	<input type="text" value="Default"/>
Description	<div style="border: 1px solid #ccc; height: 60px;"></div>		

Ensure that the **Enabled?** box is checked. Select one or more countries to enable the field for in the **Countries** section, and optionally, specify locale-specific labels in the **Labels** section.

### *Data loading and survivorship*

Survivorship of addresses during data load or change requests involving primary address updates depends on the status (active, inactive) of the record, the source system rankings, the address ordinal, and timestamp information.

To ensure uniqueness of a primary address, primary addresses cannot be inactive or invalid. If multiple primary addresses are defined, the entity is not loaded. If no primary addresses are defined, one address is automatically selected as primary, based on survivorship rules.

If an existing primary address is marked as invalid or inactive, that primary address is updated as False (non-primary) and the next available address is set to primary, based on survivorship rules.

### **Address verification**

When you add or update an address, the address verification now returns more detailed information on parts of the address that could and could not be verified. This information is accessible when you add or update a profile or work within a change request.

When address verification occurs, Network stores the following values to indicate the level of verification:

- **Verified** – A complete match was made from the available data.
- **Partially Verified** – A partial match was made based on available data. The address may require more details for a full match.
- **Ambiguous (Incomplete)** – Multiple addresses may match the input. More detail may be required.
- **Unverified** – Not enough information is available to verify the address, or the information provided is invalid.
- **Data Steward Override** – The address has been overridden by a data steward.





- **Not Verified** – Verification has not been performed for the address.

Post-processing indicates the level at which address fields were verified. Network returns verification details for the following levels and fields:

- **None/Country** – country\_\_v
- **Administrative area** – administrative\_area\_\_v
- **Locality** – locality\_\_v
- **Thoroughfare** – thoroughfare\_\_v
- **Building** – building\_\_v
- **Premise** – premise\_\_v
- **Delivery point** – postal\_code\_\_v, organization\_\_v, post\_box\_\_v

### VERIFY AN ADDRESS IN A PROFILE

From within a profile, click the **Verify** link at the bottom of the **Addresses** section. After verification completes, detailed results are returned directly under the link.

Verify
Extended Info

**Address Verification Status:** Incomplete ✕

**Verified fields**

**Country:** United States  
**State:** New York  
**City:** Rochester

**Unable to verify fields**

**Premise:** 101  
**Zip Code:** 14614-1408

### VERIFY AN ADDRESS FROM WITHIN AN ADD OR CHANGE REQUEST

From within a change request that includes updates to the address or an add request, click the link in the **Address Verification Status** row to revert the address.

Address (new 1)

✓
✕
✎

<b>Address Verification</b>	<b>No Value</b>	<b>Incomplete</b>
Status		Click <a href="#">here</a> to revert to original.

Click the subsequent link to verify the address. After verification completes, detailed results are returned directly under the link.

**Address Verification Status:** Incomplete ✕

**Verified fields**

**Country:** United States  
**State:** Michigan  
**City:** Detroit  
**Thoroughfare:** Porter St

If the address is not fully verified, you can edit or add values to the address fields and verify the address again.



## Sunshine Act reporting enhancements

The US compliance target subscription now includes additional information, including alternate keys for entities for all compliance data types. Also, Massachusetts (MA) CRI data and additional SLN compliance data are available from both the US compliance target subscription and the profile page.

**Note:** The Sunshine Act Reporting feature will be unavailable temporarily from April 17<sup>th</sup> to April 26<sup>th</sup>. Enhancements will be made available in Sandbox and Production environments after that time.

### VIEW SOURCE DATA FROM A PROFILE

To view source data from within a profile, click **Compliance Data** in the left navigation area of the profile. Scroll to the bottom of the page to view the additional MA CRI and SLN data sections.

▼ MA CRI ⓘ		04-15-2015
MA CRI ID		163724
First Name		Vinod
Middle Name		B
Last Name		Patel
Suffix		
Full Name		Vinod Patel
Organization		
Address Line 1		49 Photine Drive
Address Line 2		
City		Lowell
State		MA
Zipcode		1854
Entity Type		Professional
Entity Type Corrected		Professional
License Type		Pharmacist
License Number		PH27347
File Year		2013

### EXPORT MA CRI AND SLN COMPLIANCE DATA

To export MA CRI and SLN compliance data, perform the following actions:

1. From the Admin console, click **System Interfaces**.
2. In the System Interfaces navigation on the left, click **US Compliance Target Subscription**.



- In the **Entity & Compliance Data Selection** section of the subscription page, click the check boxes for the additional source you want to export:
  - MA CRI (Massachusetts CRI) data
  - SLN data

## US Compliance Target Subscription

Start Job Cancel Save

**▼ Details**

Name

Description 

This target subscription exports source data for all HCP and HCO records in your Network instance. Source data is updated on the 22nd of every month.

**▼ Schedule**

Trigger  Scheduled  Manual

**▼ Entity & Source Data Selection**

Checkmark the option(s) below to export individual file(s):

HCP  NPI  DEA   SLN  MASSCRI

HCO  NPI  DEA  CMS Teaching Hospital

**▼ Job History**

ID	Start Time	Duration	Type	Outcome
95	2015-04-14T00:42:00-04:00	a few seconds	UNMASTERED	COMPLETE

When you run the subscription, individual files containing each set of data will be exported. The exported files will look similar to the following (for MA CRI data):

	A	B	C	D	E	F	G	
1	Veeva Network ID	alt 1_c	aa_AltKey_c	alt_key_2_c	MA CRI ID	First Name	Middle Name	Last
2	625094304158713000	CN-0000-0000-0000-0000-25CQ-VC3D-0100	US25CQVC3C4	US25CQVC384	12345	Jane	S	Mira

Note that the export includes alternate keys for each entity.

## Merge and unmerge

When you merge and unmerge records, Network now displays information on the progress of the request as it processes.

### DOWNSTREAM SYSTEM SUPPORT

To better support downstream systems that do not handle unmerge operations (such as Veeva CRM), Network now provides additional unmerge functionality that enables you to effectively



unmerge record content for these systems. This functionality must be enabled in the admin console for systems that require it.

Where a system does not support unmerge, Network enables you to create a new record with a new Network ID, based on the information from the original source. Custom keys from the original record are not restored in the new record.

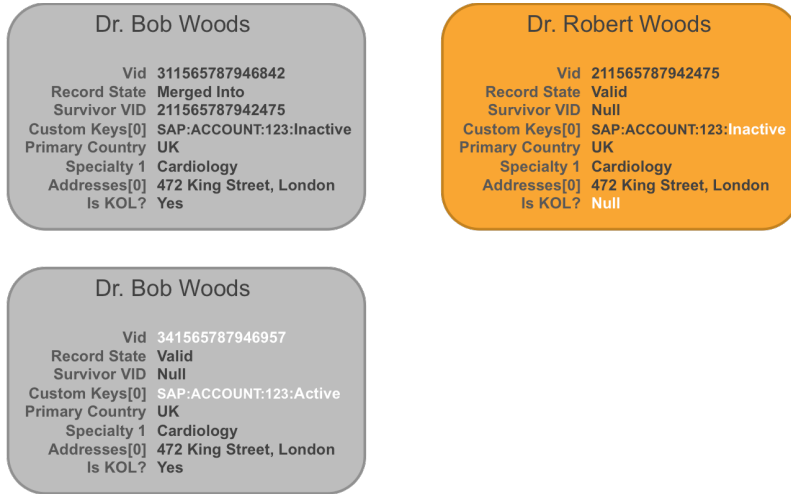
When you attempt an unmerge operation on that system, the **Unmerge Source Records** dialog alerts you that the system does not allow a standard unmerge, but enables you to perform the unmerge if the administrator has enabled it for the system.

The screenshot shows the 'Data Lineage' interface for a 'Customer Master Record'. At the top, there are filters for 'cs\_import', 'CONTRACT', and 'change\_request'. Below this is a table with columns for 'Last Updated' and 'Job Details'. A modal dialog titled 'Unmerge Source Records' is open, displaying a list of source records with checkmarks. A red warning message is shown: 'The system 'CONTRACT' does not allow re-activating source keys. A new record will be created without 'CONTRACT' Custom Key(s).' The dialog has 'Cancel' and 'Unmerge' buttons.

**Note:** Veeva OpenData source cannot be unmerged.

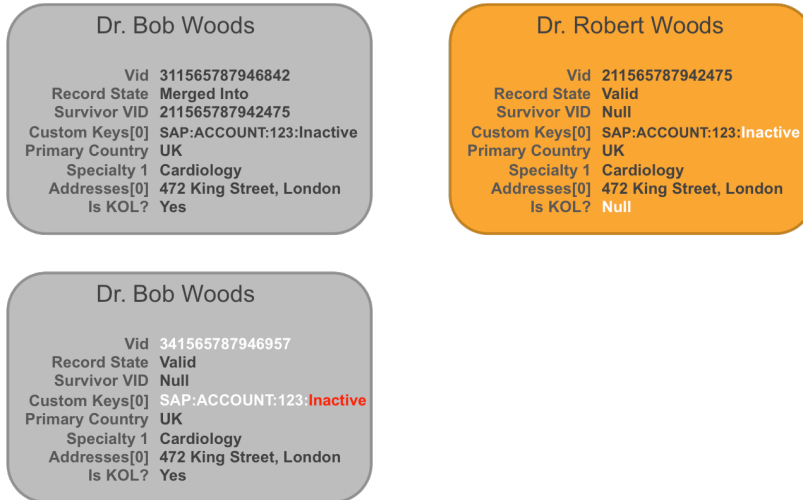


The following diagram illustrates an unmerge for a system that supports a standard unmerge operation:



The original record is restored with a new Network ID and existing custom keys.

The following diagram illustrates an unmerge for a system that does not support a standard unmerge operation:



In this case, the new record retains information from the original merged record, with the exception of the Network ID and custom keys.



### Enabling unmerge without source keys

The administrator sets the unmerge behavior for a system in the Add System dialog (through **System Interfaces > Systems > Add System** in the Admin console). In this dialog you can also prevent a system from allowing unmerge.

**Note:** All CRM systems *must* be set to **Unmerge without source keys** or **Do not unmerge**.

**Edit System** ✕

Name

Proprietary  
 Yes  No  
Data from this source is shared with Veeva Master Data.

Unmerge and retain source keys  
 **Unmerge without source keys**  
 Do not unmerge

Restricted data  
 Yes  No

Description

### UNMERGE ADD REQUESTS

Data stewards can now unmerge add requests from a customer record. From within a profile, click **Data Lineage** to the right and select the change\_request.

**Data Lineage** Unmerge

1 - 3 of 5

Jump to a section ▾

**Customer Master Record**

cs\_import

HCP  
641411069734028289

BBM

HCP  
876654876653769833

change\_request

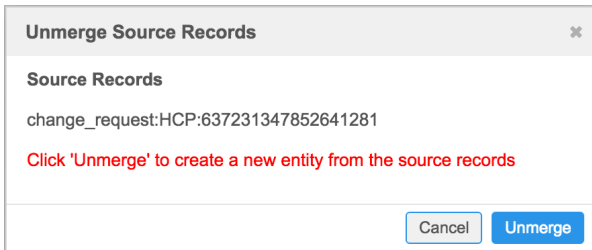
HCP  
637231347852641281

>

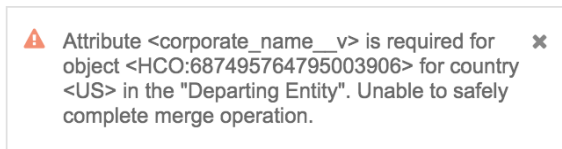
Job Details				
Last Updated	2015-04-30 14:09:24	2015-05-04 22:45:41	2015-06-02 17:26:52	
Primary Information				
First Name	James	<input checked="" type="checkbox"/> James	<input type="checkbox"/> Carl	<input checked="" type="checkbox"/> James
Last Name	Johnston	<input checked="" type="checkbox"/> Johnston	<input type="checkbox"/> Henderson	<input checked="" type="checkbox"/> Johnston
Network Entity ID	641411069734028289	<input checked="" type="checkbox"/> 641411069734028289	<input type="checkbox"/> 636944181046019072	<input checked="" type="checkbox"/> 641411069734028289
HCP Type	Prescriber	<input checked="" type="checkbox"/> Prescriber	<input checked="" type="checkbox"/> Prescriber	<input checked="" type="checkbox"/> Prescriber
Specialty 1	Cardiovascular Disease	<input checked="" type="checkbox"/> Cardiovascular Disease		<input checked="" type="checkbox"/> Cardiovascular Disease
Status	Active	<input checked="" type="checkbox"/> Active		<input checked="" type="checkbox"/> Active
AMA Do Not Contact?	No/False	<input checked="" type="checkbox"/> No/False		<input checked="" type="checkbox"/> No/False
PDRP Opt Out?	No/False	<input checked="" type="checkbox"/> No/False		<input checked="" type="checkbox"/> No/False



Click the **Unmerge** button in the **Unmerge Source Records** dialog.



Note: If the original data change request does not include all required fields, an error occurs and the unmerge fails.



### GENERAL MERGE AND UNMERGE UPDATES

When you unmerge a source record and a conflict occurs with an existing alternate key value, a new alternate key is generated. Previously, a duplicate key would block the unmerge process.

If a merge error occurs as the result of a Suspect Match task, a system message alerts the data steward if the task is still open on screen in Network. This message also appears within that task for later viewing, in case it was not seen when it first occurred.

### MERGE RECORDS

When you merge records, Network processes the request in the background and updates the task progress as you work on other tasks.

1. To merge records, open an existing record that you want to merge with another record.
2. In the profile bar to the left of the record, click **Find Suspect Matches** to find a potential match.
3. In the Find Suspect Matches dialog, type a search keyword and click **Next**. Alternatively, you can search by the record’s Veeva ID, if known.
4. On the resulting page, select a record and click the **Create 1 Suspect match** button to begin the merge process.

### Find Suspect Matches for:



**JOHN KING IV** ★

Ophthalmology  
1365 Washington Ave Ste 101 Albany New York 12206-1099 United States

▼

Displaying 1 to 20 of 22 (1 Selected)

---



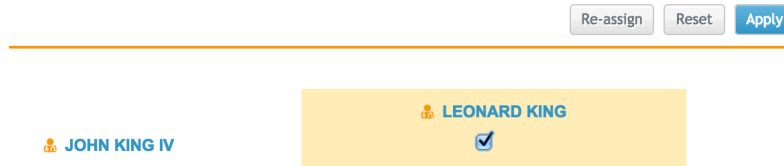
**LEONARD KING** ★

**SUSPECT MATCH**



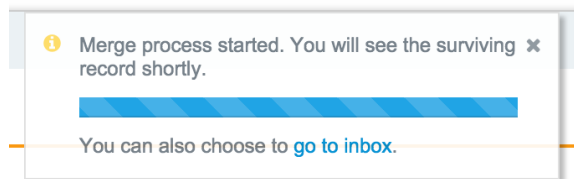
The Suspect Match page appears with both records for review.

5. Click the check box for the record you want to merge and then click the **Apply** button at the top right of the page.

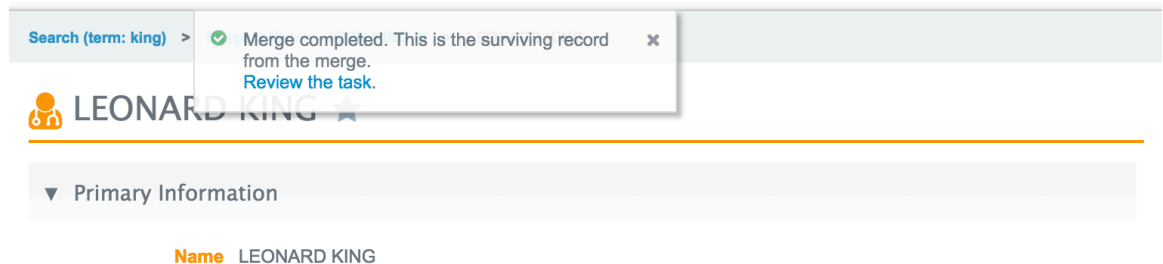


6. In the Apply Suspect Match dialog, type a resolution note and click the **Apply** button. Note that if you opt to go to the next task task from the resolution note, the merge will continue in the background.

A system message at the top of the page indicates that the process has started. Results of the merge will appear when they are available. You do not have to remain on the page for the operation to complete successfully.



When the operation completes, a system message indicates that it has completed and provides a link to the related task. The new record resulting from the merge appears.



7. To view the related task, click the **Review the task** link.





## UNMERGE RECORDS

When you unmerge records, Network processes the request in the background and updates the task progress as you work on other tasks.

1. To unmerge records, open a surviving record from a previous merge.
2. In the profile bar to the left of the record, click **Data Lineage** to view sources that contribute to the record.
3. On the Data Lineage page, select the item to unmerge and click the **Unmerge** button at the top right of the page.

**Data Lineage** Unmerge

1 - 3 of 5

Jump to a section Customer Master Record

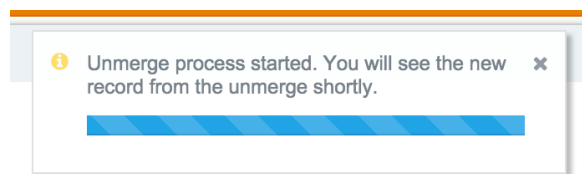
cs\_import HCP 641411089734028289
  **BBM** HCP 876687453365879522
  change\_request HCP 637231347852641281

Job Details			
Last Updated	2015-04-30 14:09:24	2015-05-04 22:45:41	2015-06-02 17:26:52

Primary Information			
First Name	James	✓ James	● Carl
			✓ James

4. In the **Unmerge Source Records** dialog, click the Unmerge button to confirm the operation.

A system message at the top of the page indicates that the process has started. Results of the unmerge will appear when they are available. You do not have to remain on the page for the operation to complete successfully.



When the operation completes, a system message indicates that it has completed and provides a link to the original record. The new record resulting from the unmerge operation appears.



Carl He
Unmerge completed. This is the unmerged record.  
[View original record.](#)

Primary Information

<b>Name</b>	Carl Henderson	<b>HCP Type</b>	Prescriber
<b>Network Entity ID</b>	701477561657459712	<b>Degree 1</b>	No Value
		<b>Degree 2</b>	No Value
<b>Primary Specialty</b>	No Value		
<b>Other Specialties</b>	No Value		
<b>Status</b>	Active	<b>Record State</b>	Valid
<b>Gender</b>	No Value	<b>Place of Employment</b>	No Value
<b>Major Professional Activity</b>	No Value	<b>Type of Practice</b>	No Value
		<b>AMA Do Not Contact?</b>	No/False
<b>PDRP Opt Out?</b>	No/False	<b>PDRP Opt Out Date</b>	No Value

- To view the original record, click the **View original record** link.

## Workflow

Data stewards can now add additional fields including those for child objects, such as a new address, license, or parent HCO, from within a change request. This improves productivity by enabling data stewards to perform additional updates on a task without extra steps in the process.

To add child object fields in a change request, open the associated task from the inbox and click the **All Fields** button at the top of the change request. This displays all fields contained in the record.

**Note:** You cannot change Veeva OpenData values or values marked with a lock icon.

Scroll to an editable (non-Veeva OpenData) section, for example **Addresses**, and click the plus icon in the section heading. A new address section appears.

ADDRESS (NEW)
-

Address Verification Status	No Value		
Address Type	No Value	No Value	
Record State	No Value	No Value	
Address Line 1 *	No Value	<input style="width: 100%;" type="text"/>	<span style="border: 1px solid #ccc; padding: 2px 5px;">✕</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">✎</span>
Address Line 2	No Value	No Value	
City *	No Value	<input style="width: 100%;" type="text"/>	<span style="border: 1px solid #ccc; padding: 2px 5px;">✕</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">✎</span>



Provide values for required fields and others, as necessary. Changes to new fields are marked by a plus **+** icon next to the new values.

▼ ADDRESS (NEW) —

Address Verification Status	No Value	<b>Override</b>	
		Click <a href="#">here</a> to verify.	
Address Type	No Value	<b>+</b> Professional	<b>x</b>
Record State	No Value	No Value	
Address Line 1 *	No Value	<b>+</b> 1020 Main Street	<b>x</b>
Address Line 2	No Value	No Value	
City *	No Value	<b>+</b> Duluth	<b>x</b>
State	No Value	<b>+</b> Minnesota	<b>x</b>

You can remove any values you added by clicking the **x** to the right of the updated value.

## Exporting the data model

Administrators can now export information from the data model to an XLS file. Country filters applied in the UI also apply to the data model export.

The exported data includes each field name in the data model, its localized label according to the user’s locale, the status, type, length, CRM field group name, and description of the field. The spreadsheet also contains columns to indicate whether or not the field is custom or a Network system field, and which countries the field is available for.

1. From the Admin console, click **Data Model**.
2. On the Network Data Model page, click the **Export** button at the top right of the page.

The data model is downloaded to your local file system in XLS format. Open the file in a spreadsheet application to see the data model contents.

Field Name	Localized UI Label	Status	Type	Length	Custom Field?	Network System Field?	Field Description	CRM Field Group Name	Available in Argentina (AR)	Availa Aust (A)
340B_eligible__v	340B Eligible?	Deactivated	Reference		False	False	Flag that indicates if an HCO is 340B eligible		False	False
accept_medicaid__v	Accept Medicaid?	Active	Reference	20	False	False	Does group accept Medicaid		False	False
accept_medicare__v	Accept Medicare?	Active	Reference	20	False	False	Does group accept Medicare?		False	False
addresses__v	Set of Addresses	Active	Set		False	False	Set of addresses for this Record		True	True
alternate_name_10__v	Alternate Name 10	Deactivated	String	500	False	False	alternate name for this entity		True	True
alternate_name_1__v	Alternate Name 1	Active	String	500	False	False	Alias for an HCO		True	True
alternate_name_2__v	Alternate Name 2	Deactivated	String	500	False	False	alternate name for this entity		True	True



## Report enhancements

A report has been added that provides counts of all pending data change requests older than one, two, or three days, to facilitate auditing of change request processing.

To access this report, perform the following steps:

1. In Network, click the **REPORTS** tab.
2. On the All Reports page, click the heading for the **Aging Report for All Pending Tasks**. To run the report without viewing its settings, you click the gear icon to the right of the report title and select **Run Report**.

**Aging Report for All Pending Tasks**

Report of outstanding DCR tasks by task type and age, grouped by country

Created by System - 2015-04-10 11:22:17

Last run 2015-04-13 11:13:31

The report page enables you to select the time period for the report, run the report on a schedule, share the report, and view previously run reports.

### Aging Report for All Pending Tasks

Report of outstanding DCR tasks by task type and age, grouped by country

Created by System

Cancel Copy Run Save

---

▼ Report Parameters

Specify the start of the time period. If not set, the report will include results since the last scheduled run

From Date This Month

▼ Schedule

Enabled

▼ Share Report

Select report recipients:

Recipient(s) Select an option

⚠ Recipient(s) should add "network-emails@veevanetwork.com" to their Inbox Email Safe List.

▼ Result History

Date Created	Status	Details
2015-04-13 11:13:31	Success	<a href="#">Download file or View</a>

Showing 1 to 1 of 1 entries

**Note:** The timestamp for the last time the report was run (date created) is based on the user’s machine time. The report schedule that you define is based on the user’s time setting in Network. The timestamp listed in the report is based on the server time.



### Select report parameters

In the Report Parameters section, click the **From Date** drop down list and select one of the following:

- **No Date** – Include results since the last scheduled report.
- **Today** – Include results for the current day.
- **Yesterday** – Include results for the previous day.
- **This Week** – Include results for the current week, starting on Sunday.
- **Last Week** – Include results for the previous week.
- **This Month** – Include results for the current calendar month.
- **Last Month** – Include results for the previous calendar month.

### Set a report schedule

In the **Schedule** section, click the **Enabled** check box and select one of the following for the schedule:

- **Hour** – Select minutes past the hour to run the report hourly.
- **Day** – Select hour of the day and minutes past the hour to run the report daily.
- **Week** – Select day of the week, hour, and minutes to run the report weekly.
- **Month** – Select day of the month, hour, and minutes to run the report monthly.
- **Year** – Select day and month of the year, hour, and minutes to run the report yearly.

### Share report results

In the **Share Report** section, click inside the **Recipient(s)** text field to see a list of recipients you can choose. You can also begin typing a name to limit the list and select a specific recipient. You can choose additional recipients in the same way.

To remove a recipient, click the x to the right of the recipient's name.

**Note:** To ensure your intended recipients receive the report properly, they should add [network-emails@veevanetwork.com](mailto:network-emails@veevanetwork.com) to their email safe list.

### Run a report

To run a report, perform the following actions:

1. From within a report, click the **Run** button.
2. In the confirmation dialog that appears, click the **Run Report** button.

A system message at the top of the page indicates when the report is complete and ready to download.

**Report result complete. [Click here to download.](#)**

If the message disappears before you click the link, the result also appears within the **Result History** section.



▼ Result History

Date Created	Status	Details
2015-04-13 11:59:39	Success	<a href="#">Download file or View</a>

Click the **Download file** link to download the file to your local system in CSV format, or click **View** to view the report in Network.

Reports > Aging Report for All Pending Tasks > View

Report run

[Export to CSV](#)

	Country	1 Day	2 Days	3 Days & Older	Total Pending
Master Pending Add Requests	All	0	3	6	9
Master Pending Change Requests	All	0	0	7	7
Total Master Pending Tasks	All	0	3	13	16
Master Pending Add Requests	United States	0	3	6	9
Master Pending Change Requests	United States	0	0	7	7
Total Master Pending Tasks	United States	0	3	13	16
Local Pending Add Requests	All	1	0	5	6
Local Pending Change Requests	All	0	0	7	7
Local Pending Suspect Matches	All	0	0	2	2
Total Local Pending Tasks	All	1	0	14	15
Local Pending Add Requests	Argentina	0	0	1	1
Local Pending Change Requests	Argentina	0	0	0	0
Local Pending Suspect Matches	Argentina	0	0	0	0
Total Local Pending Tasks	Argentina	0	0	1	1
Local Pending Add Requests	China	0	0	0	0
Local Pending Change Requests	China	0	0	2	2
Local Pending Suspect Matches	China	0	0	0	0
Total Local Pending Tasks	China	0	0	2	2

The report lists requests that have been sent to Veeva OpenData stewards as well as local data stewards.



## Report viewer enhancements

The following general enhancements have been introduced for the report viewer.

### FULL SCREEN VIEW

You can now view reports full screen by clicking the View Full Screen button at the top right of the report.

**Report run** View Full Screen [Export to CSV](#)

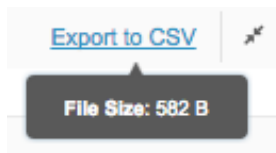
TASK TYPE	COUNTRY	1 DAY	2 DAYS	3 DAYS & OLDER	TOTAL PENDING
Master Pending Add Requests	All	0	0	8	8
Master Pending Change Requests	All	1	0	27	28
Total Master Pending Tasks	All	1	0	35	36
Master Pending Add Requests	China	0	0	0	0

### COLUMN RESIZING

You can resize a column by clicking the divider between columns in the header and dragging the column's edge to make it wider or narrower.

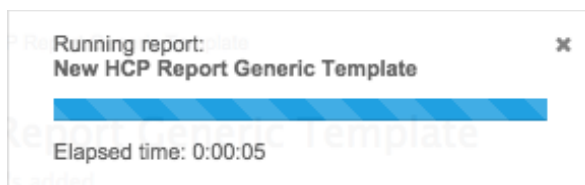
### EXPORT BUTTON

When you hover over the **Export to CSV** button or link, the file size now appears in rollover text.



### REPORT RUN TIME MESSAGE

When you run a report, a system message at the top of the page displays a progress bar and elapsed time indicator.



### HORIZONTAL SCROLLING

The report viewer now uses the same scrolling indicators used in the inbox.

James	Johnston	Prescriber
Anita	Michelle	Prescriber
Jamie	Bell	Prescriber
Tom	Jerry	Prescriber
Jeremy	Smith	Prescriber



## API

The data privacy flag has been added for the Retrieve Fields Metadata and Retrieve Field Details Metadata API. This flag determines whether a field in an opted-out HCP record will be masked with a blank, a localized label, or nothing.

The Search API has a new parameter that enables you to include all related parent HCOs in the entities found in supplemental results. The `supplemental` parameter can be set to return either one, all, or no parent HCOs with the results.

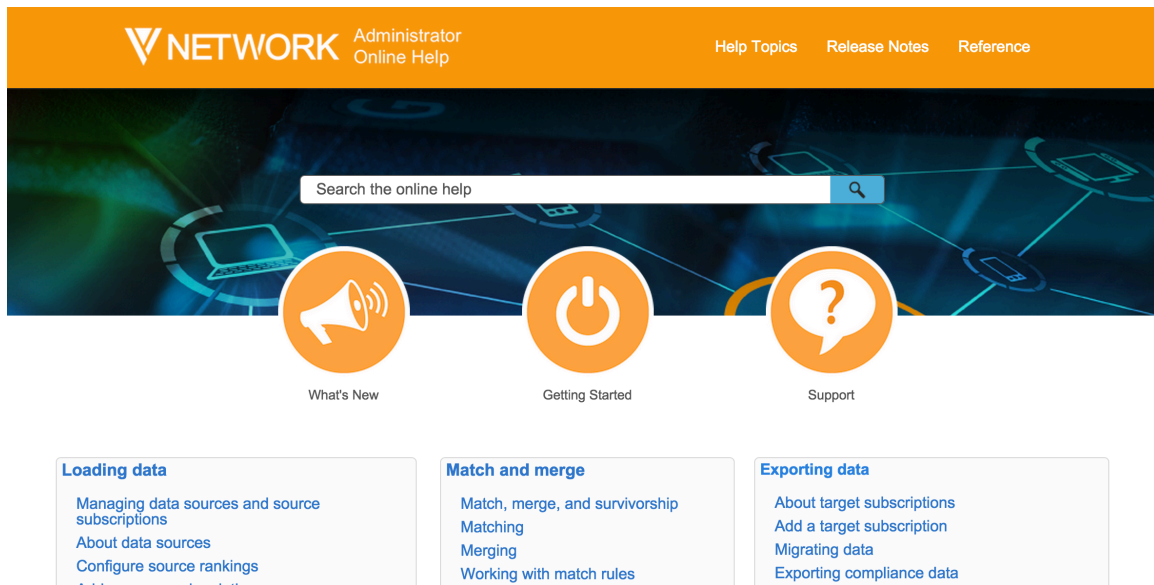
API documentation now includes details indicating the user roles (for example, admin or API-only user) that have permission to use each API.

For detailed documentation on the updates for this release, visit the Network developer site at [developer.veevanetwork.com](http://developer.veevanetwork.com).

## Online help

The online help, available from the **Help** link at the top right of any Network page, has been completely redesigned.


The landing page of the online help includes role-specific topic areas based on the type of user logged in (administrator, data steward, standard user). It also includes links to past release notes and a glossary (**Reference > Glossary**), and glossary terms are highlighted with rollover definitions throughout the help content.







Individual help topics make better use of the page, with a side navigation for related information.

 **NETWORK** Administrator  
Online Help


[Help Topics](#) [Release Notes](#) [Reference](#)

You are here: [Help Topics](#) > [Match and merge](#) > [Working with match rules](#) > [About the matching process](#)

## About the matching process

The matching process consists of the following steps:

- **Address cleansing** validates incoming address data by running it through an address cleansing engine that ensures address formats are identical and that postal addresses are correct. Addresses are corrected against their respective location where possible but cannot necessarily be validated specifically for each particular entity.
- **Key matching** occurs to complete the simplest matches before other matches. This step does not apply to first time loads, as Network has no prior external keys to compare. On subsequent loads, once an external key is linked to a Network entity, matching can be done on the external key to accelerate the matching process by avoiding fuzzy match for those records.
- **Blocking** identifies sets of candidate matches for incoming records, according to "blockers" defined in the match rules. Blocking data reduces the number of comparisons that are required. Each block definition is used as search criteria against data in the Network instance and the results of each search create the individual blocks used in the match process. The search criteria are exact; the data returned from the customer database is an exact match to the search criteria. The search includes the entire customer instance, including both Network and customer-owned records in the customer org.



- [Working with match rules](#)
- [Configuring match rules](#)
- [About the matching process](#)**
- [About match rules](#)
- [Blockers](#)
- [Classifiers](#)
- [Evaluating pairs in a collation](#)
- [About NULL matching](#)
- [Leveraging other comparison types](#)
- [Default match rules](#)