

# Veeva Network MDM

Veeva Network MDM 26R3.0 Early Release Notes

November 2026

Contents

**About these Release Notes** ..... **9**

Release dates ..... 9

Subscribe to release notifications ..... 9

Software releases and maintenance ..... 9

Release Notes and Data Governance documents ..... 9

**Browser requirements** ..... **9**

**What's new** ..... **10**

Key dates for 26R3.0 ..... 10

Features ..... 10

**Network AI** ..... **14**

Enable Network AI ..... 15

Data exploration agent ..... 15

Highlights ..... 15

Supported objects ..... 15

Users access ..... 16

Open the agent ..... 16

Chat examples ..... 18

Results returned in the chat ..... 19

Cancel a chat ..... 21

Logs ..... 22

Creating a Data Exploration AI agent ..... 22

Add an AI agent ..... 22

Agent usage log ..... 24

Review chat sessions ..... 24

Chat details ..... 25
Export the log ..... 26
AI Usage Tokens ..... 27
View used tokens ..... 27
View usage tokens by time ..... 28
View usage tokens by user ..... 28
Semantic Data Model ..... 29
Benefits ..... 29
Access the semantic data model ..... 30
Update the definitions ..... 30
Definition details ..... 32
Adding definitions for custom objects ..... 33
Logs ..... 33
**Network Widgets ..... 34**
Hide addresses on account profiles ..... 34
Supported widgets ..... 34
Hide addresses ..... 35
**Profiles ..... 36**
Display hidden relationships in the Revision History ..... 36
What are hidden relationships? ..... 36
Show hidden relationships ..... 37
Impact to other Network MDM features ..... 37
**Search ..... 38**
Customize search results display ..... 38

Highlights ..... 38
Supported objects ..... 39
Supported fields ..... 39
Supported search displays ..... 39
Impact to existing search results ..... 39
Default search layout ..... 39
Process for adding a search result layout ..... 41
Configure a search result layout ..... 42
Assign the search result layout to a DVP ..... 43
Assign users to the DVP ..... 43
Clone layouts ..... 44
Logs ..... 44
**Inbox ..... 45**
Suspect match tasks ..... 45
**CDA data model ..... 46**
Supported countries ..... 46
Fields ..... 46
Reference data updates ..... 46
**OpenData 2.0 data model ..... 47**
Supported countries ..... 47
Fields ..... 47
Reference data updates ..... 47
Top and Main Org custom fields ..... 48
Enable the fields ..... 48

Supported countries ..... 48
Top/Main Org Veeva ID fields ..... 49
New custom fields ..... 49
Overriding the OpenData Main Org or Top Org field value ..... 50
Calculating the Top/Main Org Network ID field ..... 50
Vault CRM integration ..... 51
DCR for calculated multivalued reference fields ..... 51
Enable this enhancement ..... 52
Submitting DCRs ..... 52
Stewarding DCRS ..... 52
**IQVIA OneKey Connector ..... 54**
IQVIA OneKey system support for country groups ..... 54
Supported systems ..... 55
Create a country group ..... 55
Existing IQVIA OneKey systems ..... 56
Validate countries during data load ..... 57
Supported systems ..... 57
Job warnings ..... 57
Record access in the Search and Retrieve APIs ..... 58
Supported APIs ..... 58
Supported systems ..... 58
Required permissions to access records ..... 58
**Data model ..... 60**
Cluster management ..... 60

Supported cluster providers and countries ..... 60
View cluster versions ..... 62
About Veeva-managed cluster versions ..... 63
Prerequisites ..... 63
Add a custom cluster version ..... 64
Edit the cluster version ..... 67
Testing cluster versions ..... 68
Disable cluster versions ..... 68
Logs ..... 69
Cluster codes on inherited addresses ..... 70
Prerequisites ..... 70
Supported fields ..... 71
Including the fields ..... 71
**OpenData subscriptions ..... 72**
Add request routing using NEX ..... 72
Impact to existing customers ..... 72
Add request routing options ..... 72
Define NEX rules ..... 73
Test NEX rules ..... 74
Download unmerged OpenData records ..... 75
Automatically download unmerged records ..... 75
**Users ..... 77**
Restrict Admin permissions ..... 77
Supported users ..... 77

Impact to existing users ..... 77
Supported features and functions ..... 78
Admin Permission Set ..... 79
Logs ..... 80
**Admin settings ..... 81**
Use NEX rules for workflow settings ..... 81
Supported workflow settings ..... 81
NEX Rule enhancements for workflow settings ..... 82
Define NEX rules ..... 82
Exporting configurations ..... 83
New configuration packages ..... 83
Existing configuration packages ..... 83
**Integrations ..... 84**
Salesforce External Client App Credential ..... 84
Why this is needed ..... 84
Action required ..... 84
Benefits ..... 84
Process overview ..... 85
Retrieve the Callback URL ..... 85
Salesforce configuration ..... 86
Create the Salesforce External Client App credential ..... 88
Activate the Network Salesforce Connector ..... 90
Verify and test the connection ..... 91
**Security ..... 92**

Single sign-on mappings ..... 92
Supported user types ..... 92
Mappings file ..... 92
Validating the mapping file ..... 93
Creating the user ..... 93
Updates to Transport Security Layer ciphers ..... 94
Impact to existing customers ..... 94
**API ..... 94**
Version Update ..... 94

## About these Release Notes

These Release Notes describe all features that will be included in Veeva Network MDM 26R3.0.

### RELEASE DATES

- **Sandbox release** (version 26R3.0) - Friday, November 27
- **Production release** (version 26R3.0.1) - Friday, December 11

### 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 MDM component.

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

The documents are posted in the following locations:

- Veeva Connect - Join the Network MDM 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 MDM Online Help

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

## Browser requirements

Veeva Network MDM 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 MDM is not supported on mobile devices.

## What's new

### KEY DATES FOR 26R3.0

- **Early Release Notes available** - Friday, November 13
- **Sandbox release** - Friday, November 27
- **Production release** - Friday, December 11

### FEATURES

The following key enhancements comprise the Veeva Network MDM 26R3.0 major release.

| | | | Enabled by Default? | ST | DS | DM | AD |
|---|---|---|---|---|---|---|---|
| **Network AI** | | | | | | | |
| Data Exploration agent | Users can now use a text-to-SQL agent to explore data in their Network MDM instance. | 26R3.0 | No | • | • | • | • |
| AI Agent configurations | Add AI agents to define the fields specific users can access in the Data Exploration agent. | 26R3.0 | No | | | | • |
| AI Usage Log | Administrators can view all interactions with the Data Exploration agent, including inputs and outputs from the AI. | 26R3.0 | No | | | | • |
| AI Usage Tokens | Administrators can break down token usage by agent or user. | 26R3.0 | No | | | | • |
| Semantic Data Model | The new data model helps the Data Exploration agent understand Network concepts and map your question to the correct objects, fields, and reference values. | 26R3.0 | No | | | | • |
| **Network Widgets - General** | | | | | | | |
| Hide addresses on account profiles | Administrators can now hide addresses on profiles by clearing the Always Display field setting in profile layouts. | 26R2.1 | Config Req'd | • | • | • | • |
| **Profiles** | | | | | | | |
| Revision History | Empty revisions are now identified as hidden relationships and display details. | 26R2.1 | Yes | • | • | • | • |

| | | | Enabled by Default? | ST | DS | DM | AD |
|---|---|---|---|---|---|---|---|
| **Search** | | | | | | | |
| Search results | Administrators can customize the fields that display in search results for different objects and countries. | 26R2.1 | Config Req'd | • | • | • | • |
| **Inbox** | | | | | | | |
| Suspect match tasks | Match highlighting for field values is now case-insensitive. | 26R2.1 | Yes | | • | • | • |
| **CDA data model** | | | | | | | |
| Supported countries | Hong Kong and Macao now support the CDA data model. | 26R3.0 | Yes | • | • | • | • |
| **OpenData 2.0 data model** | | | | | | | |
| Supported countries | Hong Kong and Macao now support the OpenData 2.0 data model. | 26R3.0 | Yes | • | • | • | • |
| Top and Main Org | Use new custom fields to send Main Org and Top Org data to Vault CRM as Network IDs. | 26R3.0 | Yes | • | • | • | • |
| DCRs for calculated multivalued fields | Changes can be submitted for multivalued fields that are calculated from individual fields. | 26R3.0 | Yes | • | • | • | • |
| **IQVIA® OneKey data** | | | | | | | |
| Multi-country system configuration | Use country groups to define record management and field ownership rules for different countries within a single IQVIA OneKey system. | 26R2.1 | Config Req'd | | | • | • |
| Validate country during data load | Records that are loaded for the IQVIA OneKey system are now validated to ensure the country is managed by IQVIA. | 26R2.1 | Config Req'd | | | • | • |
| API access to OneKey records | OneKey records are returned in the Search and Retrieve API only if the country is included in the IQVIA OneKey system configuration | 26R2.1 | Config Req'd | | Developers | | |

| | | | Enabled by Default? | ST | DS | DM | AD |
|---|---|---|---|---|---|---|---|
| **Data Model** | | | | | | | |
| Custom cluster versions | Create custom cluster versions by uploading mapping files from your data provider. | 26R3.0 | Config Req'd | | | • | • |
| Cluster codes on inherited addresses | Include cluster code fields in your Network Address Inheritance configuration. | 26R3.0 | Config Req'd | | | • | • |
| **OpenData Subscriptions** | | | | | | | |
| Add request routing | Route Add Requests submitted from specific systems or users to local data stewards. | 26R3.0 | Config Req'd | | | • | • |
| Download unmerged records | Newly created records from unmerges can be automatically downloaded during your OpenData subscription job. | 26R2.1 | Config Req'd | | | • | • |
| **User management** | | | | | | | |
| Restrict access to admin functions | Use permission sets to remove access for adding and editing configurations in the Admin console. | 26R2.1 | Config Req'd | | | | • |
| **Admin Settings** | | | | | | | |
| Workflow settings | Create flexible conditions for auto-approving DCRs and reviewing master rejections using Network expressions. | 26R2.1 | Config Req'd | | | | • |
| Exporting configurations | SSO settings are no longer supported in configuration packages. They must be configured on each Network MDM instance. | 26R2.1 | Yes | | | | • |
| **Network integrations** | | | | | | | |
| Salesforce credentials | Create a Salesforce External Client App credential to connect to Salesforce using OAuth 2.0 instead of a username and password. | 26R3.0 | Config Req'd | | | | • |
| **Security** | | | | | | | |
| Single sign-on (SSO) | SSO dynamic provisioning can now assign Inbox Task Groups to Data Stewards, giving them immediate access to their tasks. | 26R2.1 | Yes | | | | • |

| | | | Enabled by Default? | ST | DS | DM | AD |
|---|---|---|---|---|---|---|---|
| TLS ciphers | To protect your data, legacy ciphers are removed from publicly accessible Network FTP servers. | 26R2.1 | Yes | | | | |
| **API** | | | | | | | |
| Version update | The Network MDM API is updated to v41.0. | 26R3.0 | Yes | | Developers | | |

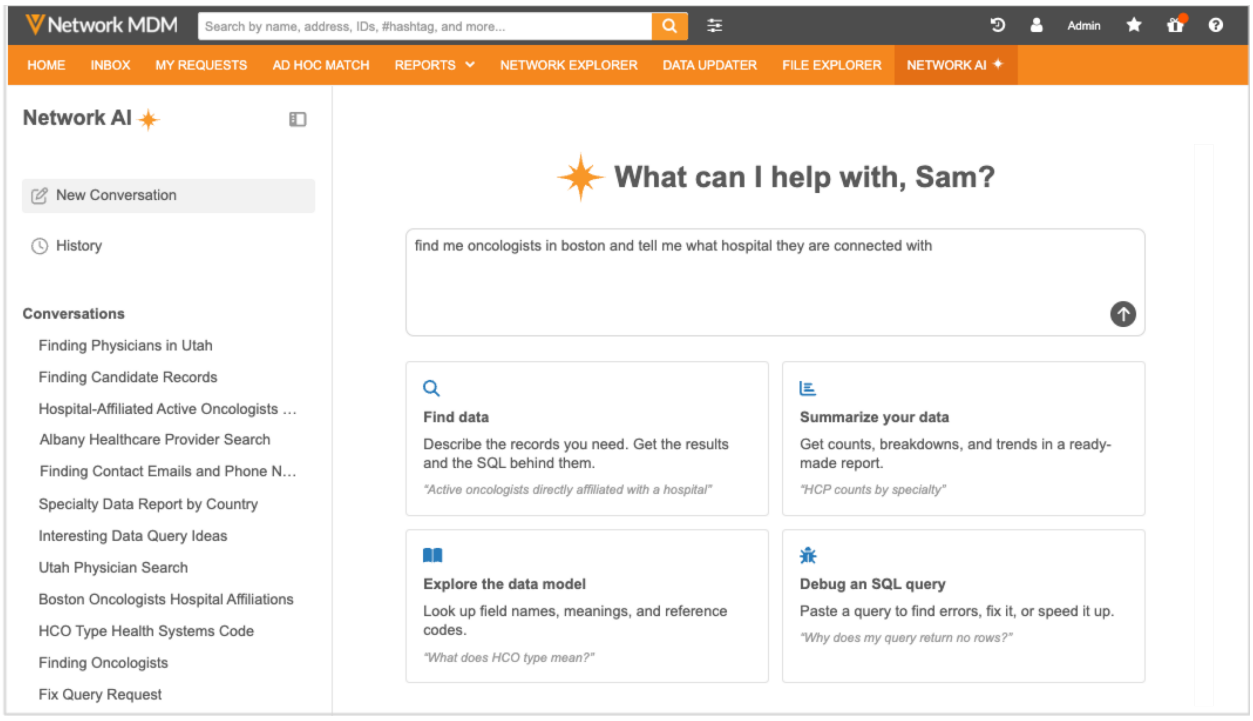
**Note:** The System and Data Admin user has all of the capabilities of the System Administrator and Data Steward users. Features and enhancements that apply to those users also apply to the System and Data Admin user.

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

## Network AI

Network MDM is introducing its first AI capabilities.

In this release, use the Data Exploration agent to ask plain-language questions about your Network MDM data and data model. If the question is about data, the agent converts your questions into SQL queries and returns the results in seconds. You can ask follow-up questions, review the SQL and sample results, and download the full result set.




This release also includes the supporting features.

| AI Features in this Release | Details |
|---|---|
| **Data Exploration agent type** | A conversational AI capability that lets you explore your Network data without writing SQL yourself. |
| **AI Agent Configuration** | Admin configuration where administrators can define the agents and assign users and user groups access to an agent. |
| **AI Usage Log** | A complete record of every Network AI interaction so you can review exactly what was asked and returned. |
| **AI Usage Tokens** | A consolidated view of how many tokens Network AI is consuming across the instance, grouped by user or agent type. |
| **Semantic Data Model** | A new data model that gives the agent the context it needs to translate your question into the correct objects, fields, and reference values. |

### *Enable Network AI*

Network AI is not enabled by default. Network AI is available as an add-on to your Network MDM license. Contact your Veeva account representative.

These features can be enabled by Veeva Support when your license is verified.

## DATA EXPLORATION AGENT

26R3

The Data Exploration agent type is a text-to-SQL agent that you can chat with to explore your Network MDM data. Ask a question in plain language and the agent writes the SQL query for you and provides the results.

Navigating complex data models, identifying the correct fields and reference values, and troubleshooting SQL queries typically requires technical specialists and can take several days. Using the Data Exploration agent allows teams to become self-sufficient by providing on-demand data analysis, allowing users to answer ad-hoc questions immediately and proactively identify data quality issues without waiting on technical resources.

### *Highlights*

- **Explore your data in natural language** - Ask questions about HCPs, HCOs and related data without needing to know SQL.
- **Built-in data access** - Results and SQL are generated and run using your data visibility profile permissions, so answers never expose data you couldn't otherwise see.
- **Localized results** - Network AI responds in your language (as long as the language is supported by Network MDM). The agent detects the language of the question and answers in the same language, including reference data labels.
- **Get SQL with the answer** - Users with advanced reporting access can use the generated SQL query or use it to refine your own reporting queries.
- **Track and govern usage** - Administrators get audit logs and usage tracking for every AI interaction, including tokens consumed and user feedback.

### *Supported objects*

- Veeva standard objects (HCPs, HCOs, Address, License, Parent HCO)
- Custom objects

### *Users access*

Access to the Network AI and its features is determined by the AI Agent configuration and your user permissions.

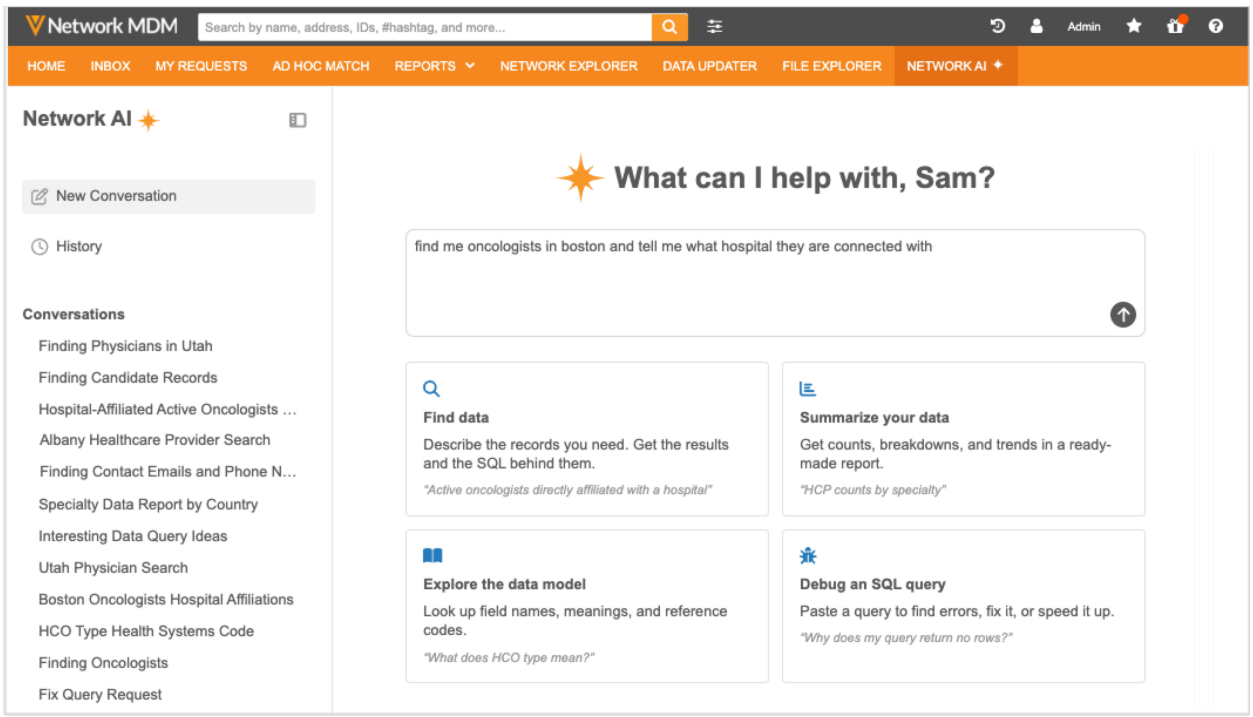
| Access | Requirements |
|---|---|
| **Using Network AI** | Use must be assigned to an AI Agent. |
| **Downloading all results** | **Can Download Reports** permission (Data Visibility Profile) |
| **Querying fields/objects** | Only fields and objects available to the user can be queried. |
| **Querying country data** | Assigned to the country (Data Visibility Profile) |

### *Open the agent*

The Data Exploration agent can be accessed from two areas in the Network MDM UI.

#### Network MDM menu bar

All users with access to the Data Exploration agent can access it from the **Network AI** tab.

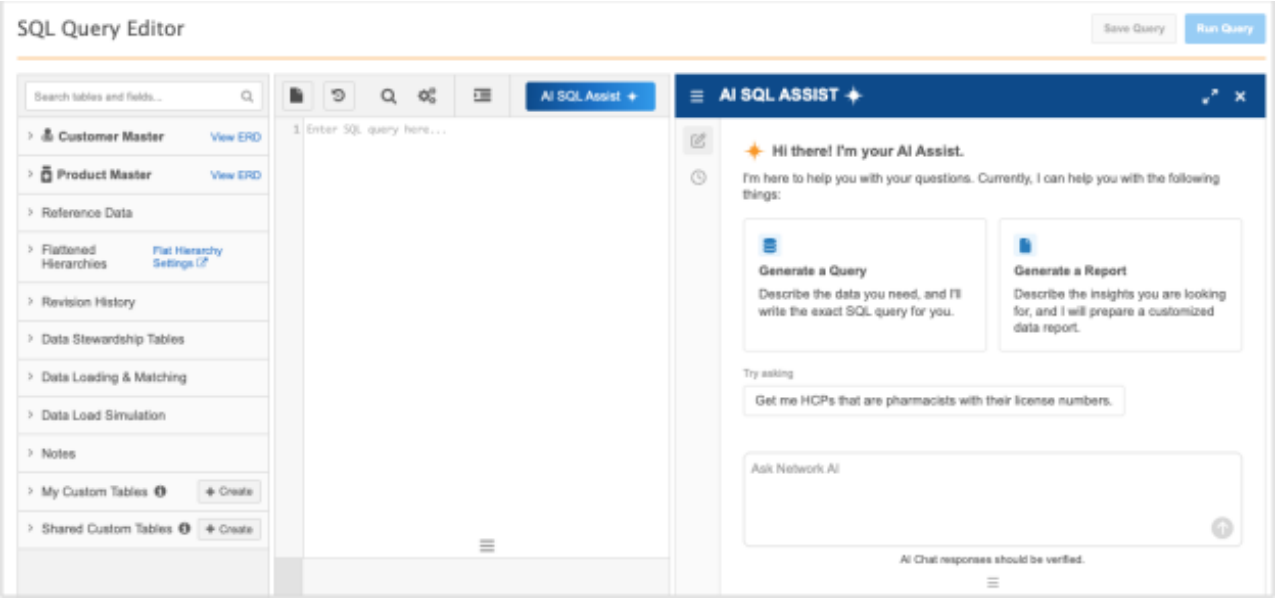



As you chat with the agent, your previous conversations display in the left pane.

## SQL Query Editor

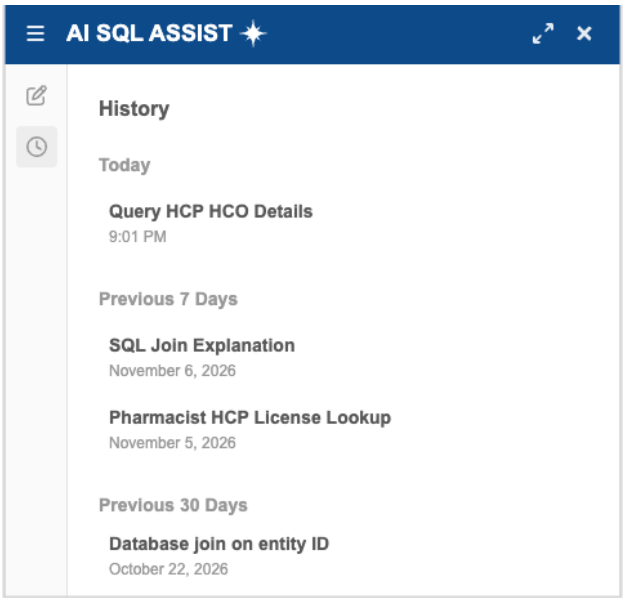
Users with advanced reporting access can use the Data Exploration agent directly within the SQL Query Editor.

Click the **AI SQL Assist** button in the query box to open the **AI SQL Assist** panel.




When a chat first opens in the SQL Editor, an introductory message explains what the assistant can do and offers clickable example prompts.

- To review previous conversations, click the **Options** menu and then the **History** icon. Only chats from the AI SQL Assist will display. Previous chats are ordered by most recent date.



### *Chat examples*

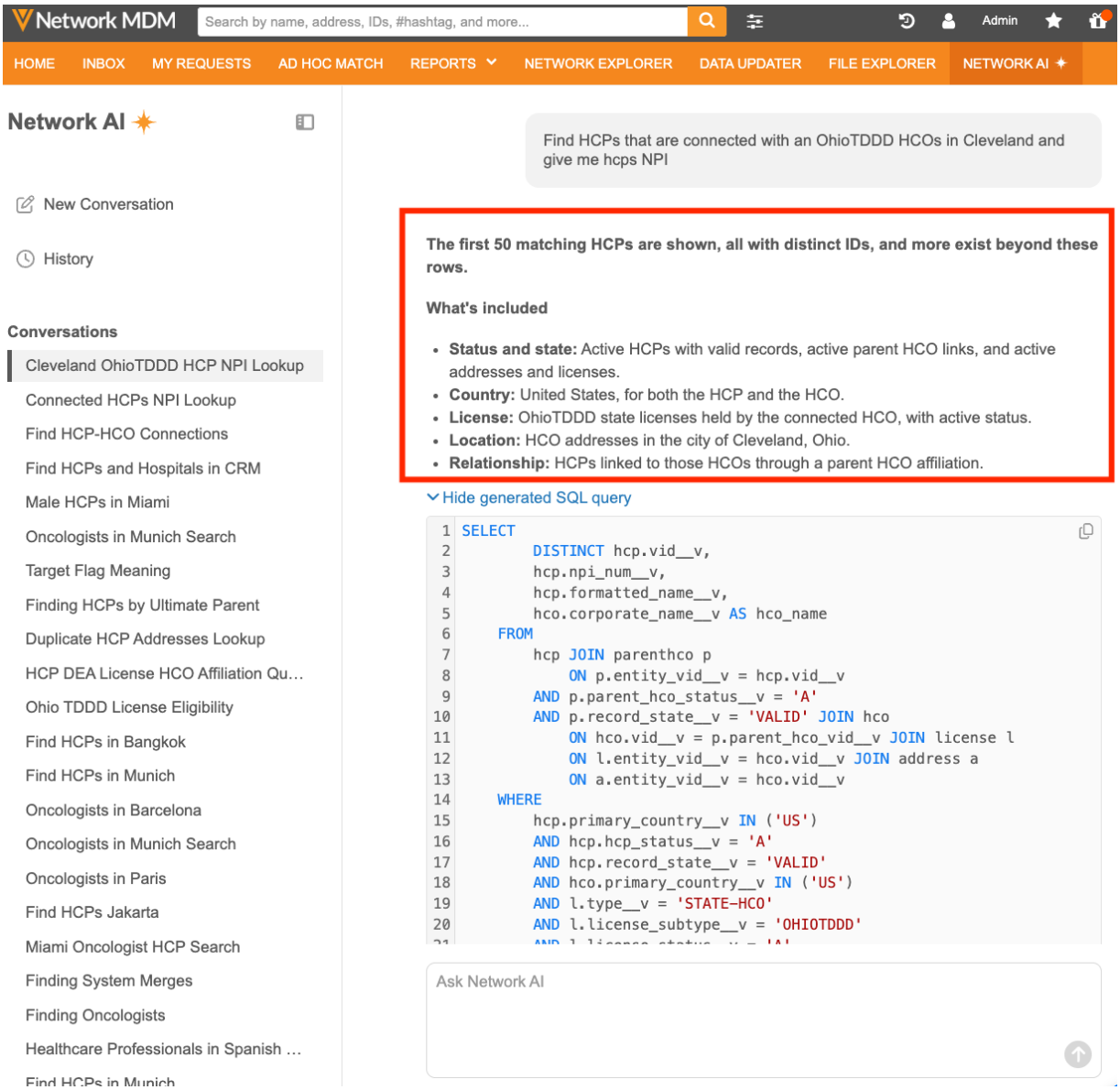
Prompt the Data Exploration agent to learn about your data, the data model, and SQL queries.

| Data Exploration Possibilities | Example prompts |
|---|---|
| Generate a SQL query through the chat without writing SQL yourself.<br><br>Ask questions about SQL queries and learn how to make them more efficient | Create a query to get detailed information about HCPs and HCOs without a custom key?<br>(highlight part of a query) Explain this to me. |
| Ask questions about your Network MDM data. | What HCOs and HCPs have been unmerged in the past month?<br>What HCPs have retired?<br>Show me oncologists in Texas.<br>Show me neurologists in Florida and the hospitals they're affiliated with.<br>Show me packages that we have and the marketbaskets that they roll up to (include indirect connections). |
| Ask questions about the Network MDM data model. | What are the CDA fields?<br>What field stores the NPI number?<br>On the HCO Type field, what is the code for health system? |

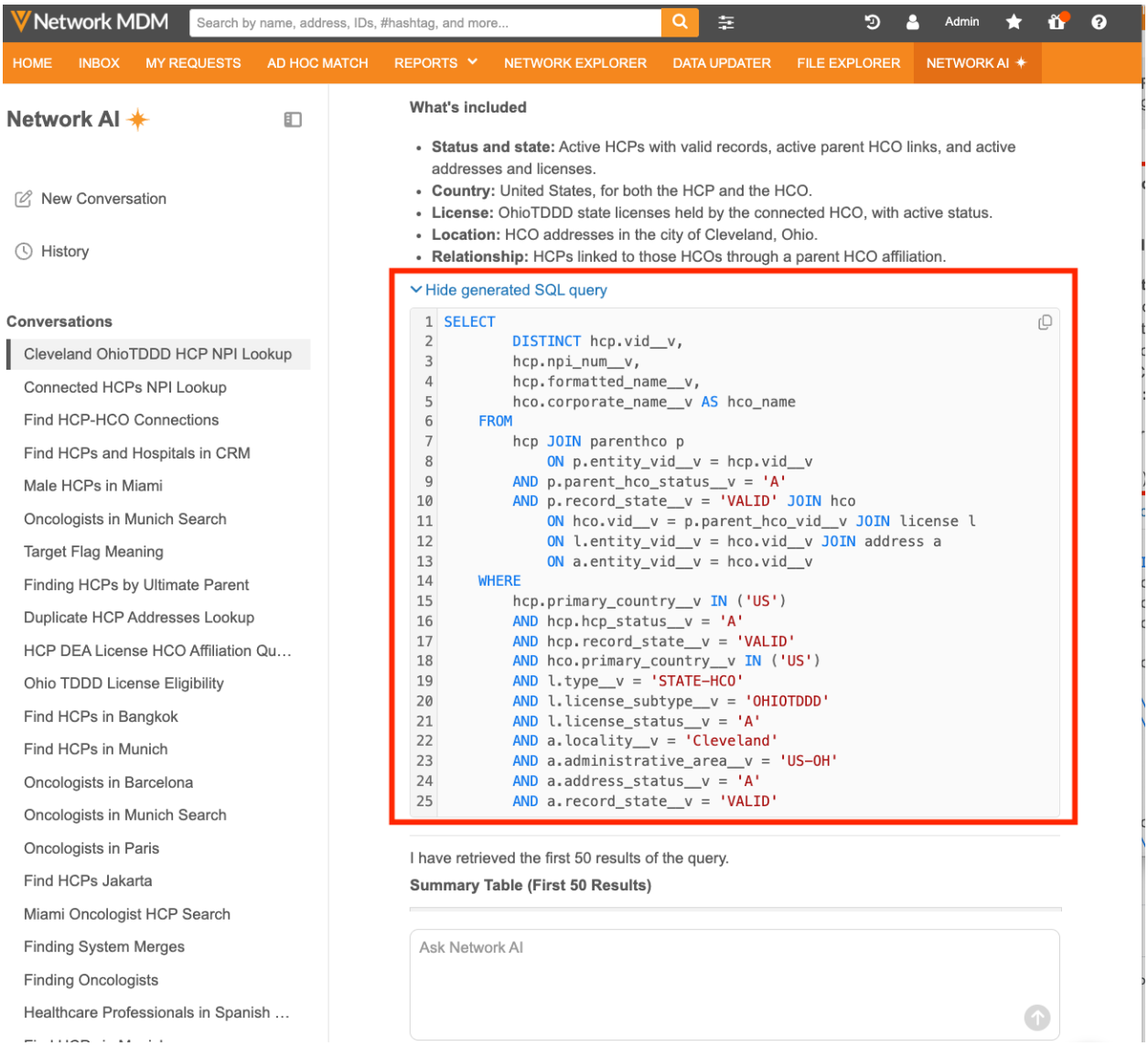
### *Results returned in the chat*

Depending on the prompt, the Data Exploration agent can return any combination of the following in its response:

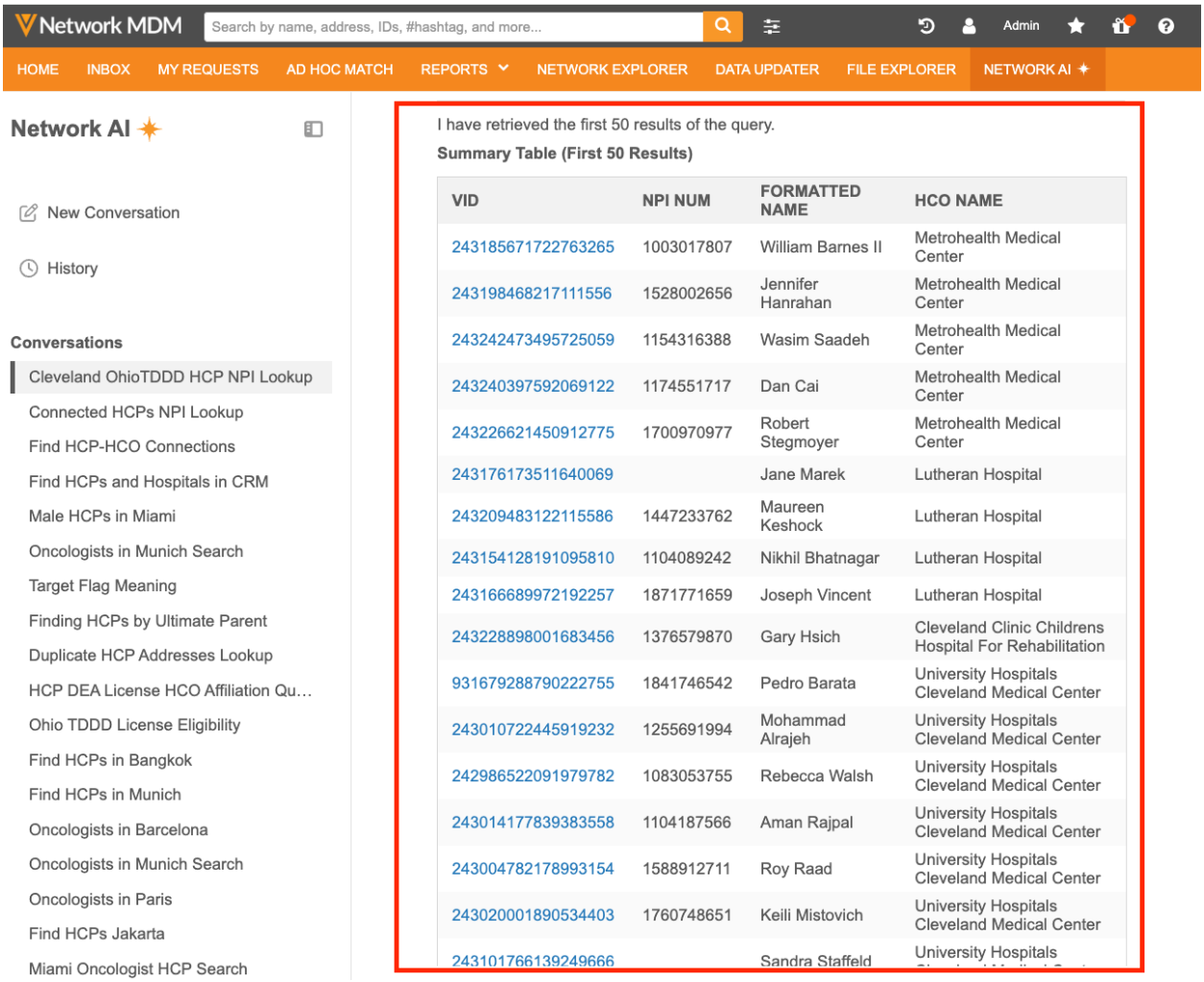
- **Explanation** - A plain-language explanation of how the agent interpreted the question, formatted for readability.



- **SQL query** - Displays if you have SQL Editor access, with syntax highlighting, a line count, a copy button, and an option to copy the query directly into the main SQL Editor.



- **Sample results** - Up to 50 records display in the chat. Copy the query and run it in the SQL Query Editor to see the full result set.




**Note:** Unless defined in the question, only active and valid records are returned in the response.

- **Download results** - Save the complete result set as a CSV or Microsoft Excel file directly from the chat.

**Tip:** Provide feedback by rating the results using the **Thumbs Up** or **Thumbs Down** icons.

### *Cancel a chat*

Before a response is returned, you can stop the agent using the **Cancel** icon in the prompt box.

### *Logs*

All interactions are tracked in the Reporting Audit History log.

## CREATING A DATA EXPLORATION AI AGENT

26R3

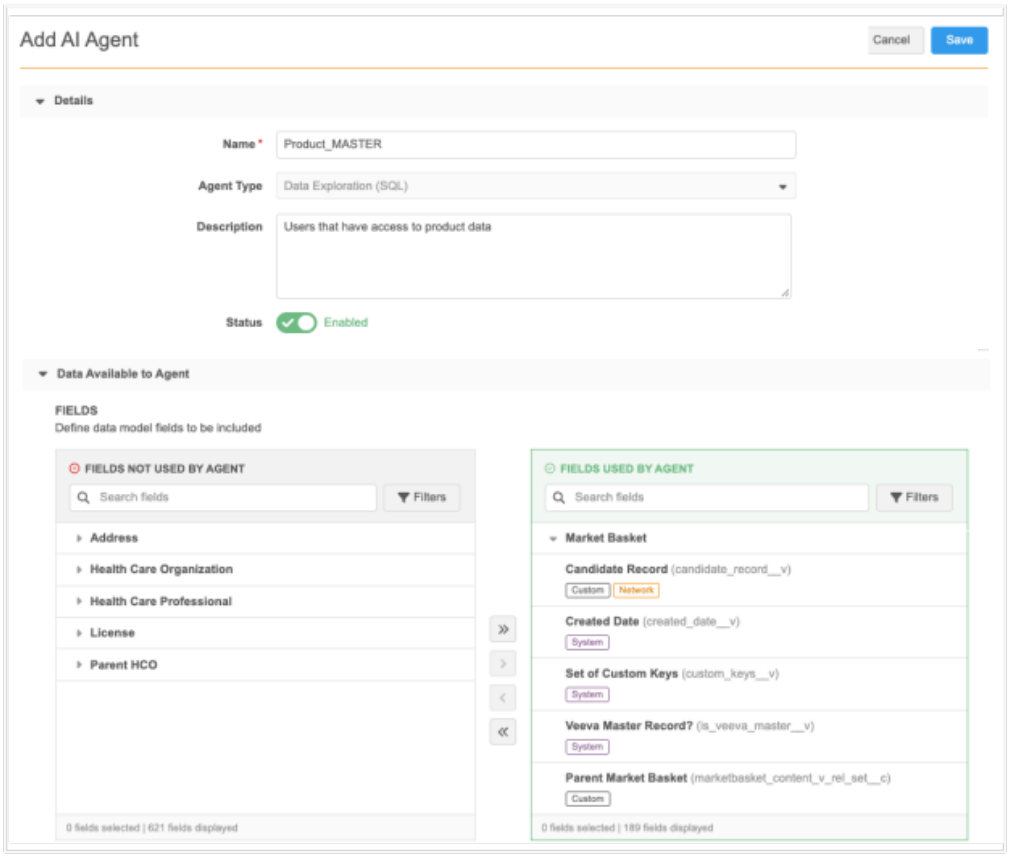
Add AI agents to define which users have access to the Data Exploration agent and the fields that are available to them. For example, you can give specific users access only to the CDA data model or access to fields used in a custom domain like Product Master.

This feature is enabled by default when Network AI is enabled in your Network MDM instance.

### *Add an AI agent*

1. In the Admin console, click **Network AI** and select **Add AI Agent**.
2. **Details** - Add a **Name** and **Description**.

   The **Agent Type** is set to **Data Exploration (SQL)** by default.




3. **Data Available to Agent** - Choose the data model fields that users assigned to this AI agent can use.

By default, all enabled fields in the semantic data model display in the **Fields Used by Agent** pane. Use the **Arrow** icons to move any fields to the **Fields Not Used by Agent** pane.

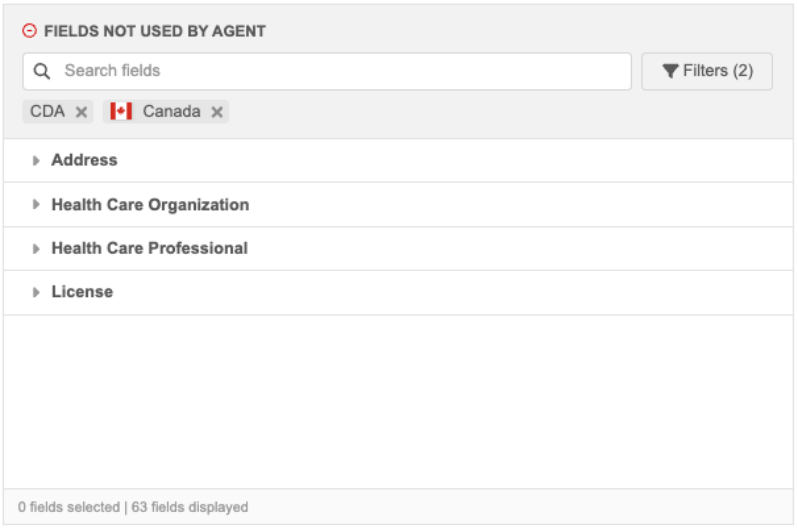
**Note:** New fields added to the Network MDM data model display in the **Fields Not Used By Agent** pane if they are enabled. You must manually move them to the **Fields Used by Agent** pane.

To get the best results follow these practices:

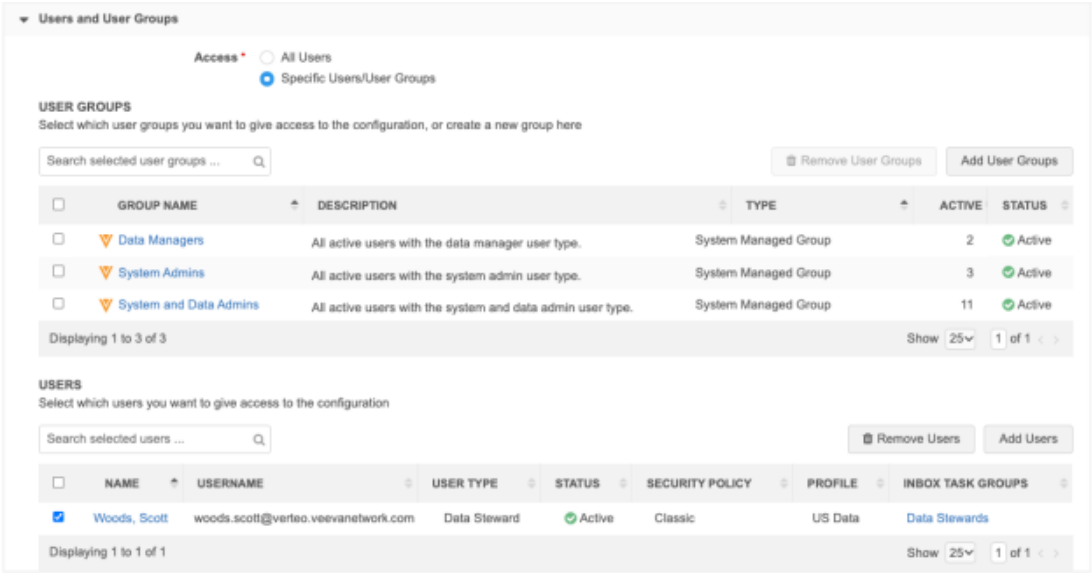
- Stick with one data model (for example use CDA, OpenData 1.0, or OpenData 2.0). This way the Network AI will know exactly which data model to use.
- Narrow the scope of available fields to those fields that your team uses.

**Filter the fields**

Click **Filter** to choose fields in specific data model schemas and countries. For example, limit the fields available to users in this AI agent to CDA fields for Canada. Use the **Arrow** (**>>**) icon to move the filtered fields into the **Fields Used By Agent** pane.




4. **Users and User Groups** - Assign the users that can access the Data Exploration (SQL) agent.




Users can be assigned to multiple AI agents. Their access to the Data Exploration agent is a union of all fields and countries assigned in those AI agents.

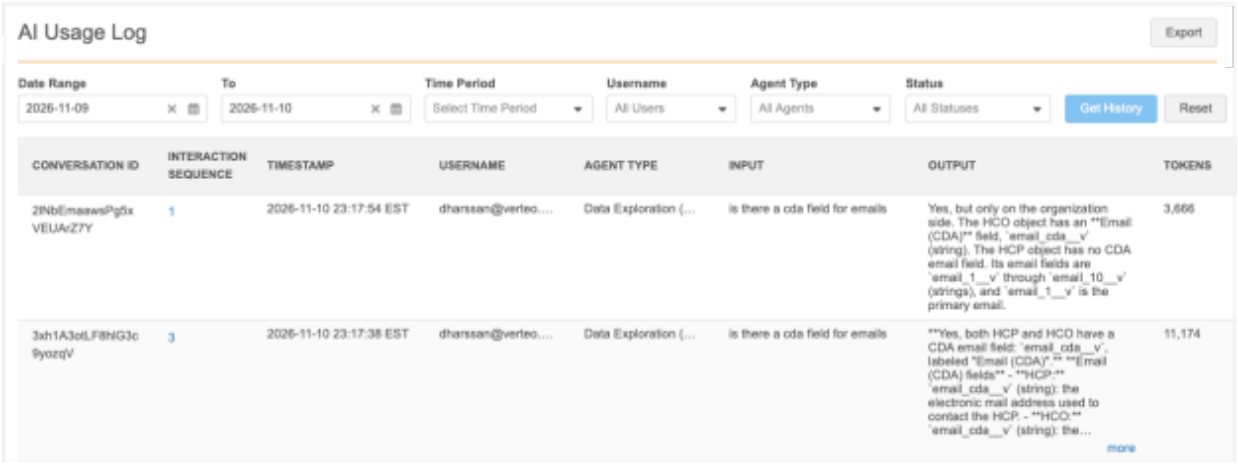
5. **Save** your changes.

   The updates apply immediately.

## AGENT USAGE LOG

26R3

The Agent Usage Log gives administrators a complete record of every Network AI interaction. Each entry captures the conversation and interaction details so you can review exactly what was asked and returned and the token usage.




### *Review chat sessions*

1. In the Admin console, click **Network AI > AI Usage Log**.

2. At the top of the log, filter the sessions you want to review using the following critieria:
    - **Date Range** or **Time Period** - Choose specific dates or a pre-configured time.

      By default, the log is includes sessions for the past day.

    - **Username** - Choose an active user.
    - **Agent Type** - By default **All Agents** display. The Data Exploration (SQL) agent is the only available agent.
    - **Status** - Filter by interaction status, for example Completed or Failed.
3. Click **Get History** to filter the log.

### *Chat details*

The log contains the following details for each session.

| Column Name | Description |
|---|---|
| **Conversation ID** | ID assigned to each new conversation. |
| **Interaction Sequence** | Each message in each session is assigned a number. The first message is 1 and the number increases with each message.<br>Click the number to open a dialog to see the chat details for the interaction.<br> |
| **Timestamp** | Time the interaction began in your timezone. |
| **Username** | User that interacted with the agent. |
| **Agent** | Agent that was used. This is Data Exploration (SQL) for all interactions. |
| **Input** | Message the user typed in the agent. |
| **Output** | Final message the user received from the agent.<br>Click **More** to open the Interaction Details dialog for the complete output and SQL query. |

| Column Name | Description |
|---|---|
| **Tokens** | Count of total tokens used in the process to get to the final output. |
| **Status** | Outcome of the interaction.<br>Possible values: In Progress, Completed, Failed, Canceled, Error. |

### *Export the log*

The log can be saved as a Microsoft Excel file.

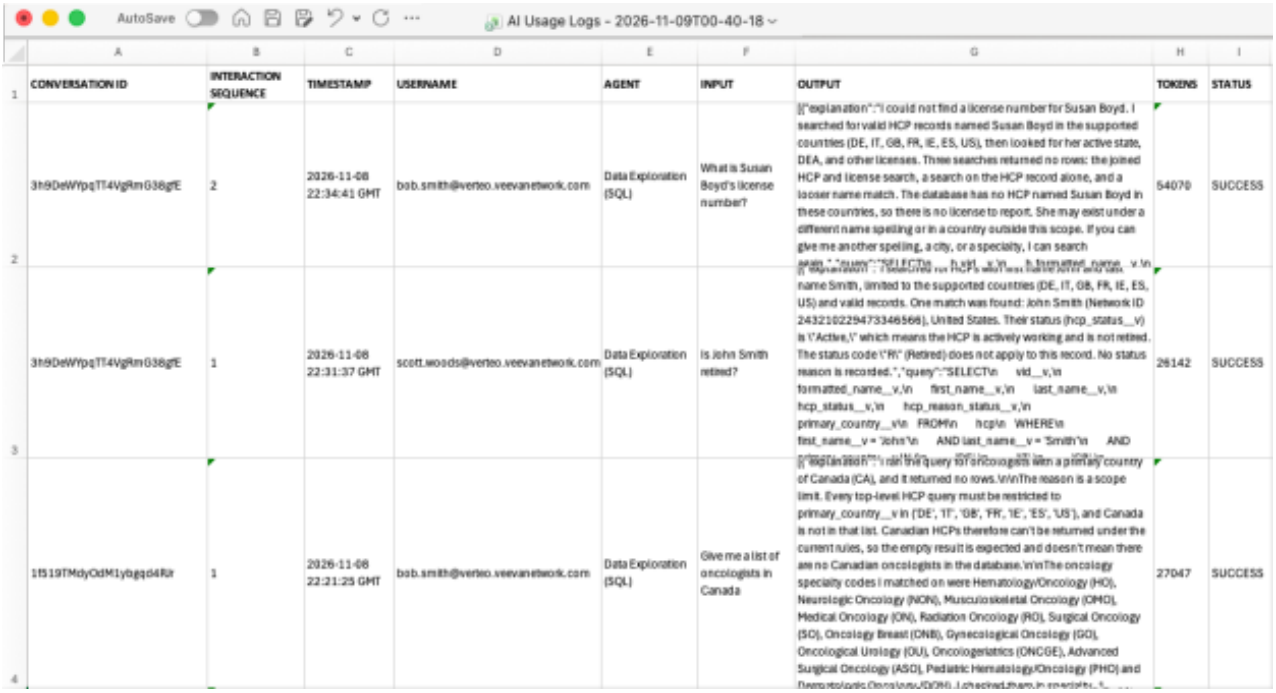
- Click **Export** to download the log.

It is saved to your local directory with the following naming convention:

`AI Usage Logs - <date_time>.xlsx`.

Example: `AI Usage Logs - 2026-11-09T00-40-18`

**Example file**

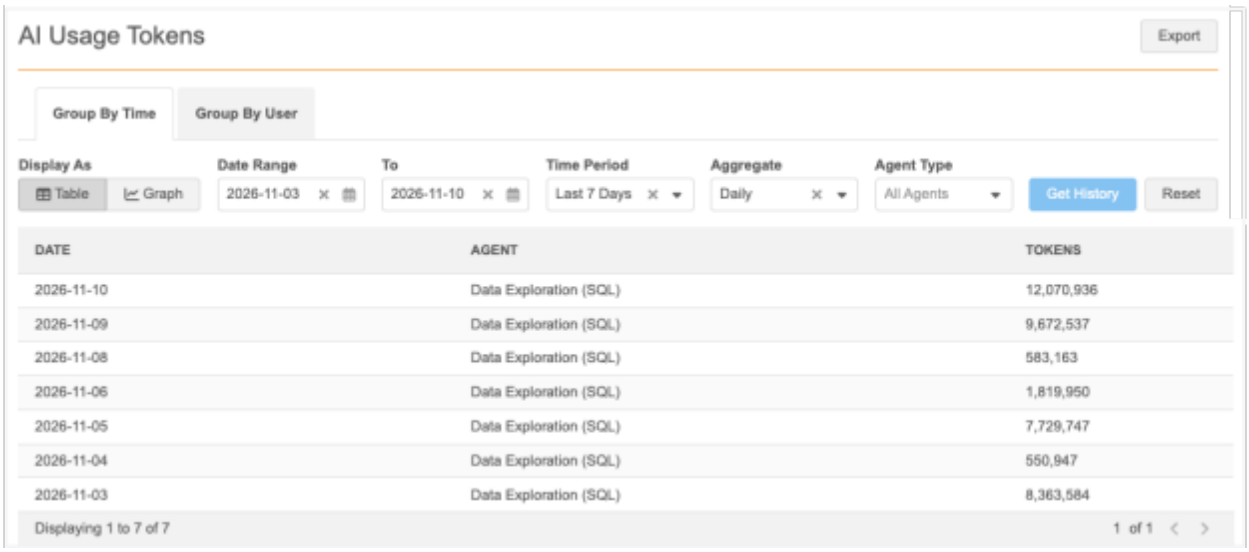



| CONVERSATION ID | INTERACTION SEQUENCE | TIMESTAMP | USERNAME | AGENT | INPUT | OUTPUT | TOKENS | STATUS |
|---|---|---|---|---|---|---|---|---|
| 3h9DeWYpqTT4VgRmG38gfE | 2 | 2026-11-08 22:34:41 GMT | bob.smith@verteo.veevanetwork.com | Data Exploration (SQL) | What is Susan Boyd's license number? | {"explanation":"I could not find a license number for Susan Boyd. I searched for valid HCP records named Susan Boyd in the supported countries (DE, IT, GB, FR, IE, ES, US), then looked for her active state, DEA, and other licenses. Three searches returned no rows: the joined HCP and license search, a search on the HCP record alone, and a looser name match. The database has no HCP named Susan Boyd in these countries, so there is no license to report. She may exist under a different name spelling or in a country outside this scope. If you can give me another spelling, a city, or a specialty, I can search again.","query":"SELECT\n v.id__v,\n h.formatted_name__v,\n | 54070 | SUCCESS |
| 3h9DeWYpqTT4VgRmG38gfE | 1 | 2026-11-08 22:31:37 GMT | scott.woods@verteo.veevanetwork.com | Data Exploration (SQL) | Is John Smith retired? | {"explanation":"I searched for HCPs whose name matches John Smith, limited to the supported countries (DE, IT, GB, FR, IE, ES, US) and valid records. One match was found: John Smith (Network ID 24321022947334656 6), United States. Their status (hcp_status__v) is \"Active,\" which means the HCP is actively working and is not retired. The status code \"R\" (Retired) does not apply to this record. No status reason is recorded.","query":"SELECT\n v.id__v,\n formatted_name__v,\n first_name__v,\n last_name__v,\n hcp_status__v,\n hcp_reason_status__v,\n primary_country__v\n FROM\n hcp\n WHERE\n first_name__v = 'John'\n AND last_name__v = 'Smith'\n AND | 26142 | SUCCESS |
| 1f519TMdyOdM1ybgqd4Rlr | 1 | 2026-11-08 22:21:25 GMT | bob.smith@verteo.veevanetwork.com | Data Exploration (SQL) | Give me a list of oncologists in Canada | {"explanation":"I ran the query for oncologists with a primary country of Canada (CA), and it returned no rows.\n\nThe reason is a scope limit. Every top-level HCP query must be restricted to primary_country__v in ('DE', 'IT', 'GB', 'FR', 'IE', 'ES', 'US'), and Canada is not in that list. Canadian HCPs therefore can't be returned under the current rules, so the empty result is expected and doesn't mean there are no Canadian oncologists in the database.\n\nThe oncology specialty codes I matched on were Hematology/Oncology (HO), Neurologic Oncology (NON), Musculoskeletal Oncology (OMO), Medical Oncology (ON), Radiation Oncology (RO), Surgical Oncology (SO), Oncology Breast (ONB), Gynecological Oncology (GO), Oncological Urology (OU), Oncogeriatrics (ONCGE), Advanced Surgical Oncology (ASO), Pediatric Hematology/Oncology (PHO) and | 27047 | SUCCESS |

## AI USAGE TOKENS

26R3

Administrators can view a consolidated view of how many tokens Network AI is consuming across the instance. Usage can be grouped by agent or by user, displayed as a table or a graph, and aggregated daily, weekly, or monthly, so you can track consumption trends and manage costs over time.




### *View used tokens*

1. In the Admin console, click **Network AI > AI Usage Tokens**.
2. Choose to view tokens by agent (**Group by Time**) or by user (**Group by User**).
3. In the **Display As** option, choose to see the data in a **Table** or **Graph**.
4. Filter the log with the following criteria:
    - **Date Range** or **Time Period** - Choose specific dates or a pre-configured time.

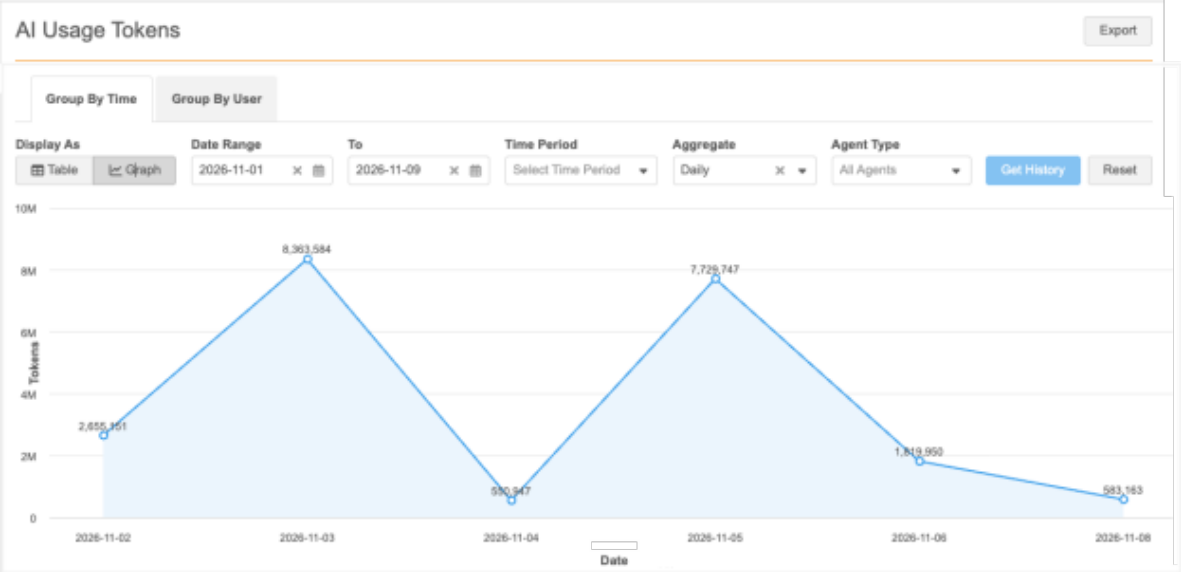
      By default, the log is includes sessions for the past day.

    - **Aggregate** (**Group by Time** tab only) - Choose Daily, Weekly, or Monthly.
    - **Username** (**Group by User** tab only) - Choose an active user.
    - **Agent Type** - By default **All Agents** display. The Data Exploration (SQL) agent is the only available agent.
    - **Status** - Filter by interaction status, for example Completed or Failed.
5. Click **Get History** to filter the log.

### *View usage tokens by time*

Tokens are aggregated by agent for the defined time.

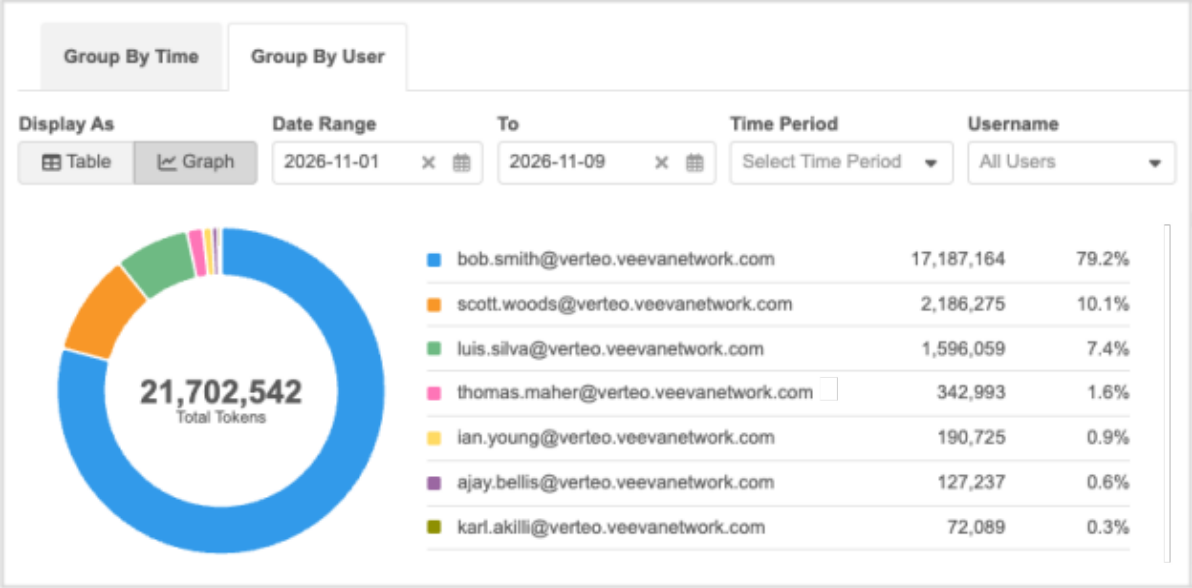
**Graph example**




### *View usage tokens by user*

Tokens are aggregated by user for the defined time.

**Graph example**



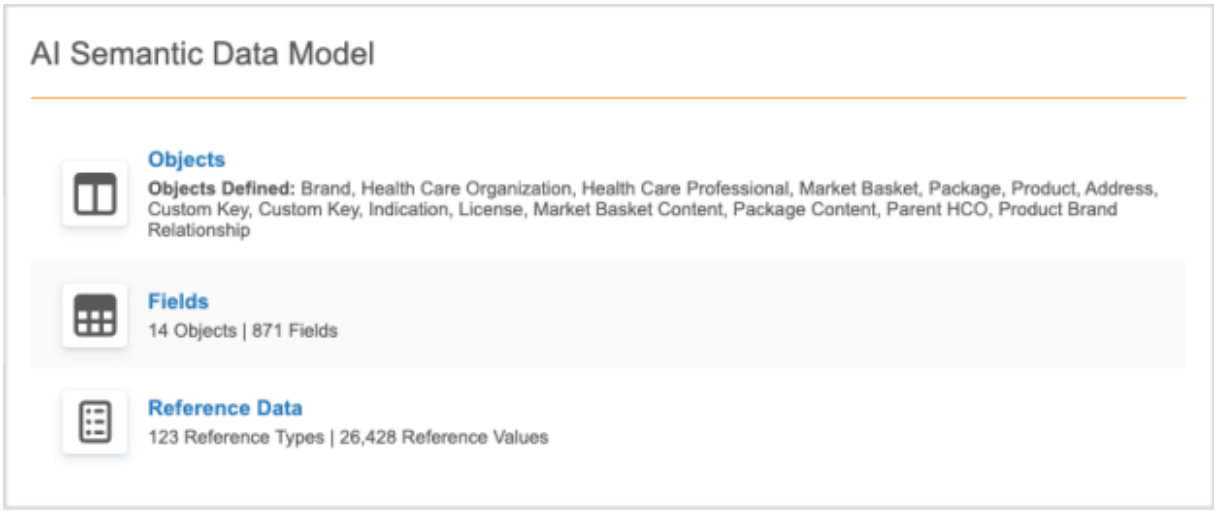
## SEMANTIC DATA MODEL

26R3

Network AI uses a semantic new data model to help the Data Exploration agent understand Network concepts and map your question to the correct objects, fields, and reference values.

It stores descriptions, instructions, and synonyms for objects and fields so the agent can identify what is relevant to a question. For example, record ownership in Network MDM is often by color (orange = Veeva, gray = local, blue = third party). These colors are added as synonyms so the agent knows that "orange HCPs" means Veeva-managed HCPs.

The semantic data model is populated with Veeva-defined descriptions, instructions, and synonyms. Administrators can add custom definitions too, for example, for custom fields and custom objects.




### *Benefits*

- **Customizable** - Define custom synonyms and instructions or override Veeva's so the agent understands your customer-specific terms.
- **Context** - Allows data managers to provide context to the data attributes and concepts that are specific to your Network MDM instance.
- **Out of the box** - Veeva Network MDM has defined the semantic data model for all standard objects, most fields, and reference values.
- **Works across languages without translation** - Defined in English but returns correct matches when a question is asked in another language.

### *Access the semantic data model*

In the Admin console, click **Data Model > AI Semantic Data Model**.

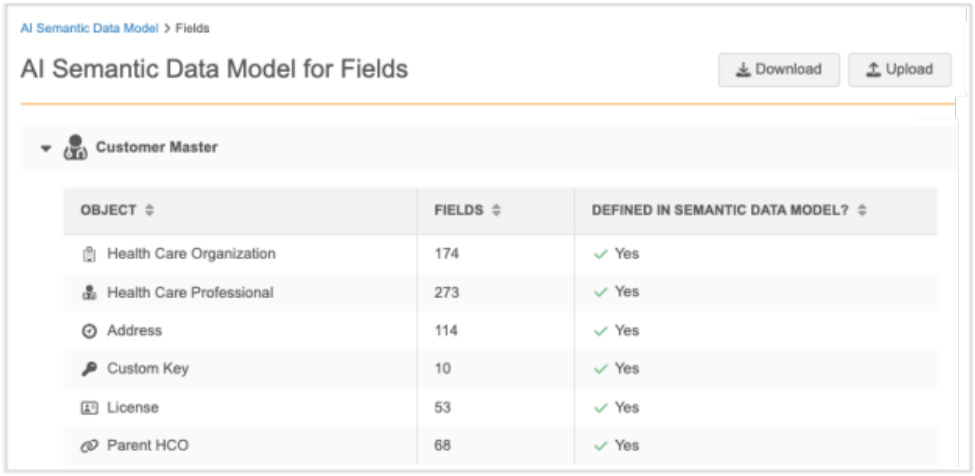
The page summarizes the following:

- **Objects** - A list of objects defined in the data model.
- **Fields** - A count of objects and fields that are defined.
- **Reference data** - A count of reference types and values that are defined.

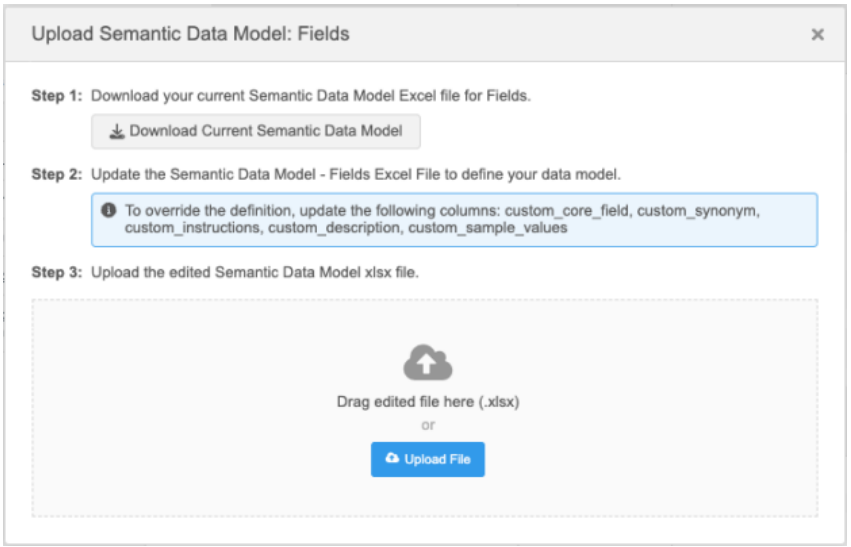
### *Update the definitions*

Administrators can view and edit the definitions for objects, fields, and reference data.

1. Click a category to see the items. For example, select **Fields** and then click **Upload**.




2. In the dialog click **Download Current Semantic Data Model**.



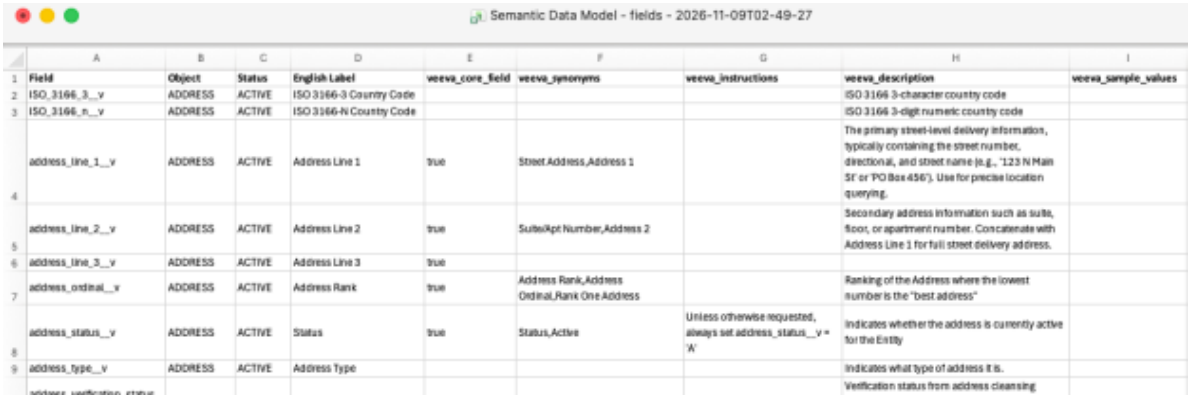
A Microsoft Excel file is saved to your local directory with the following naming convention: `Semantic Data Model - <object> - <date_time>.xlsx`

3. Open the file to view the predefined definitions in the `veeva_` columns. You can add custom definitions in any of the columns prefixed with `custom_`.

   Options:

   - **Override a Veeva definition** - Update the corresponding `custom_` column. The agent will ignore the Veeva column.
   - **Delete the Veeva definition** - Add `null__v` to the customer column.
   - **Revert back to a Veeva definition** - Remove the definition from the `custom_` column.

   **Tip:** A definition can use a combination of Veeva and custom values. For example, use custom synonyms but keep the Veeva instruction and description.

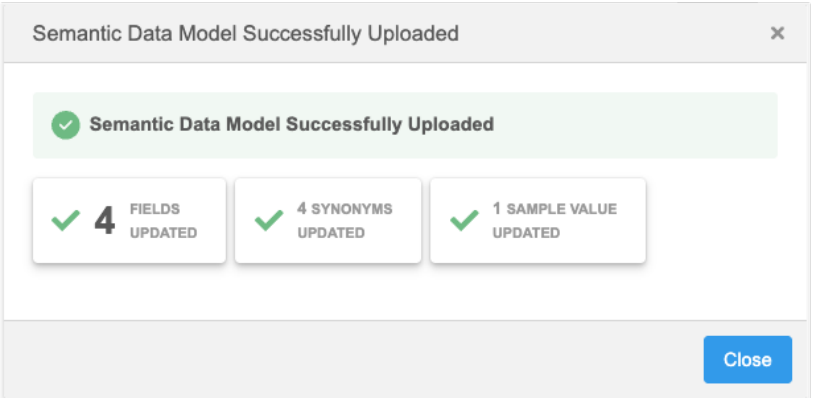



| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Field | Object | Status | English Label | veeva_core_field | veeva_synonyms | veeva_instructions | veeva_description | veeva_sample_values |
| 2 | ISO_3166_3__v | ADDRESS | ACTIVE | ISO 3166-3 Country Code | | | | ISO 3166 3-character country code | |
| 3 | ISO_3166_n__v | ADDRESS | ACTIVE | ISO 3166-N Country Code | | | | ISO 3166 3-digit numeric country code | |
| 4 | address_line_1__v | ADDRESS | ACTIVE | Address Line 1 | true | Street Address,Address 1 | | The primary street-level delivery information, typically containing the street number, directional, and street name (e.g., "123 N Main St" or "PO Box 456"). Use for precise location querying. | |
| 5 | address_line_2__v | ADDRESS | ACTIVE | Address Line 2 | true | Suite/Apt Number,Address 2 | | Secondary address information such as suite, floor, or apartment number. Concatenate with Address Line 1 for full street delivery address. | |
| 6 | address_line_3__v | ADDRESS | ACTIVE | Address Line 3 | true | | | | |
| 7 | address_ordinal__v | ADDRESS | ACTIVE | Address Rank | true | Address Rank,Address Ordinal,Rank One Address | | Ranking of the Address where the lowest number is the "best address" | |
| 8 | address_status__v | ADDRESS | ACTIVE | Status | true | Status,Active | Unless otherwise requested, always set address_status__v = 'A' | Indicates whether the address is currently active for the Entity | |
| 9 | address_type__v | ADDRESS | ACTIVE | Address Type | | | | Indicates what type of address it is. | |
| | | | | | | | | Verification status from address cleansing | |

4. When the updates are complete, click **Upload** on that item's page.

   The definitions are validated. An error message displays if issues are found. Click **Download Error File** to review the issues so you can fix them and upload the file again.

5. When the upload is successful, a summary of the updates displays.




The semantic data model is now updated with those changes.

### *Definition details*

The following definitions are supported for objects, fields, and reference data in the semantic data model.

| Definitions | Format | Supported For | | |
|---|---|---|---|---|
| | | **Objects** | **Fields** | **Reference Data** |
| **Instructions**<br>How the object should be used in queries. | - 500 character limit<br>- single language | Yes | Yes | - |
| **Descriptions**<br>Helps the agent find relevant objects. | - 500 character limit<br>- single language | Yes | Yes | Yes |
| **Synonyms**<br>Alternate terms | - 500 character limit<br>- comma-separated list<br>- single language<br>- supported characters: Spaces, underscores (_), apostrophes('), hyphens (-).<br>- Can include multi-word phrases. | Yes | Yes | Yes |
| **Core Fields**<br>Important fields that should always be available to the agent. Examples: vid__v, record_state__v, address_line_1__v, and name fields should always be available to give context to the displayed results. | - 500 character limit<br>- single language<br>- Possible values: TRUE, FALSE, or empty | - | Yes | - |
| **Sample Values**<br>Values that help the agent understand what to expect. | - 500 character limit<br>- single language<br>- supported characters: Spaces, underscores (_), apostrophes('), hyphens (-). | - | Yes<br>(text fields only) | - |

## *Adding definitions for custom objects*

Add definitions for the custom domains in your Network MDM instance so the Data Exploration agent understand the objects, fields, and reference data to provide meaningful responses.

### Custom objects

Define the different joins that are available for your objects so the Data Exploration agent can answer questions about the relationships.

**Example definitions for Brand (Product Master)**

| custom_synonyms | custom_instructions | custom_description |
|---|---|---|
| Brand,Product Brand,Trade Name,Brand Name | Object: brand_v__c<br>Purpose: Represents the commercial brand under which one or more products are marketed and sold<br>Primary Key: vid__v<br><br>Joins:<br>Products: brand_v__c.vid__v = product_brand_v_rel__c.related_entity_vid__v AND product_brand_v_rel__c.entity_vid__v = product_v__c.vid__v<br>Market Basket Membership: brand_v__c.vid__v = marketbasket_content_v_rel__c.entity_vid__v | The commercial brand name associated with one or more pharmaceutical or medical products, used for marketing, promotion, and commercial reporting. |

## *Logs*

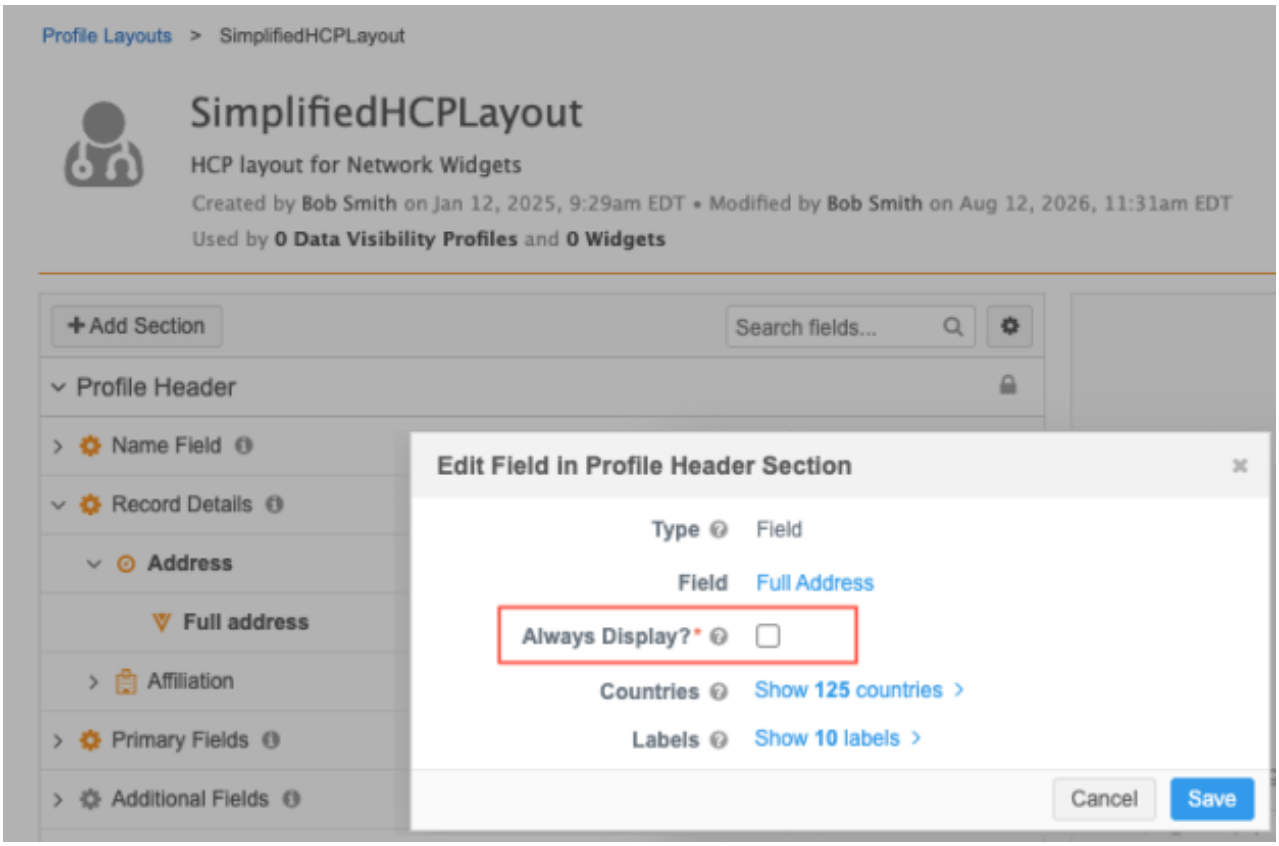
Updates to the semantic data model are tracked in the System Audit History.

## Network Widgets

### HIDE ADDRESSES ON ACCOUNT PROFILES

26R2.1

Administrators can now hide addresses on account profiles using the field settings in the profile layout. The **Always Display** field setting now applies to Network widgets. When the setting is cleared, addresses are removed from profiles in widgets using that layout.




This enhancement is available by default. Administrators can configure the **Always Display** setting in profile layouts.

#### *Supported widgets*

- Profile widget
- Search widget

This change is applied to any Search or Profile widget using the profile layout.

### *Hide addresses*

1. In the Admin console, click **Data Model > Profile Layouts**.
2. Open the layout assigned to your widget.
3. Under **Profile Header**, expand **Record Details**.
4. In the **Address** section, click the **Edit** icon next to the **Full Address** field.
5. In the **Edit Field in Profile Header Section** dialog, clear the **Always Display** setting. It is enabled by default.
6. **Save** your changes.

Addresses will now be removed from profiles in widgets that use the layout.

## Profiles

### DISPLAY HIDDEN RELATIONSHIPS IN THE REVISION HISTORY

26R2.1

A record's revision history lists all changes to the record, but when an update involves a hidden relationship, no details display for that version. These empty updates are now flagged as hidden relationships and you can choose to view the details.

This enhancement is available by default. Users can enable the option to display hidden relationships on applicable records.

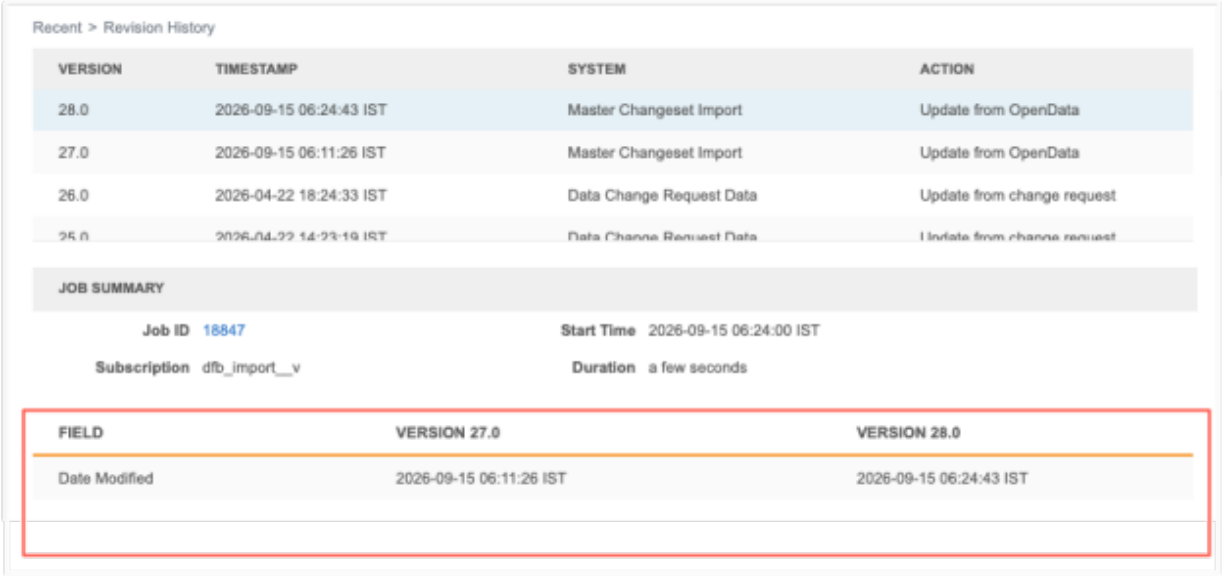
#### *What are hidden relationships?*

For completeness, each change creates a version in the record's revision history. This includes changes that OpenData makes to a record's relationships.

A hidden relationship occurs in the following situations:

- The parent HCO is not downloaded to your Network MDM instance.
- In 2-tier and 3-tier hierarchies for China, the relationship is dropped because it is not valid for the hierarchy structure.

When OpenData adds a relationship that is hidden to you for one of the reasons above, a new version is created, but only the modified date displays.

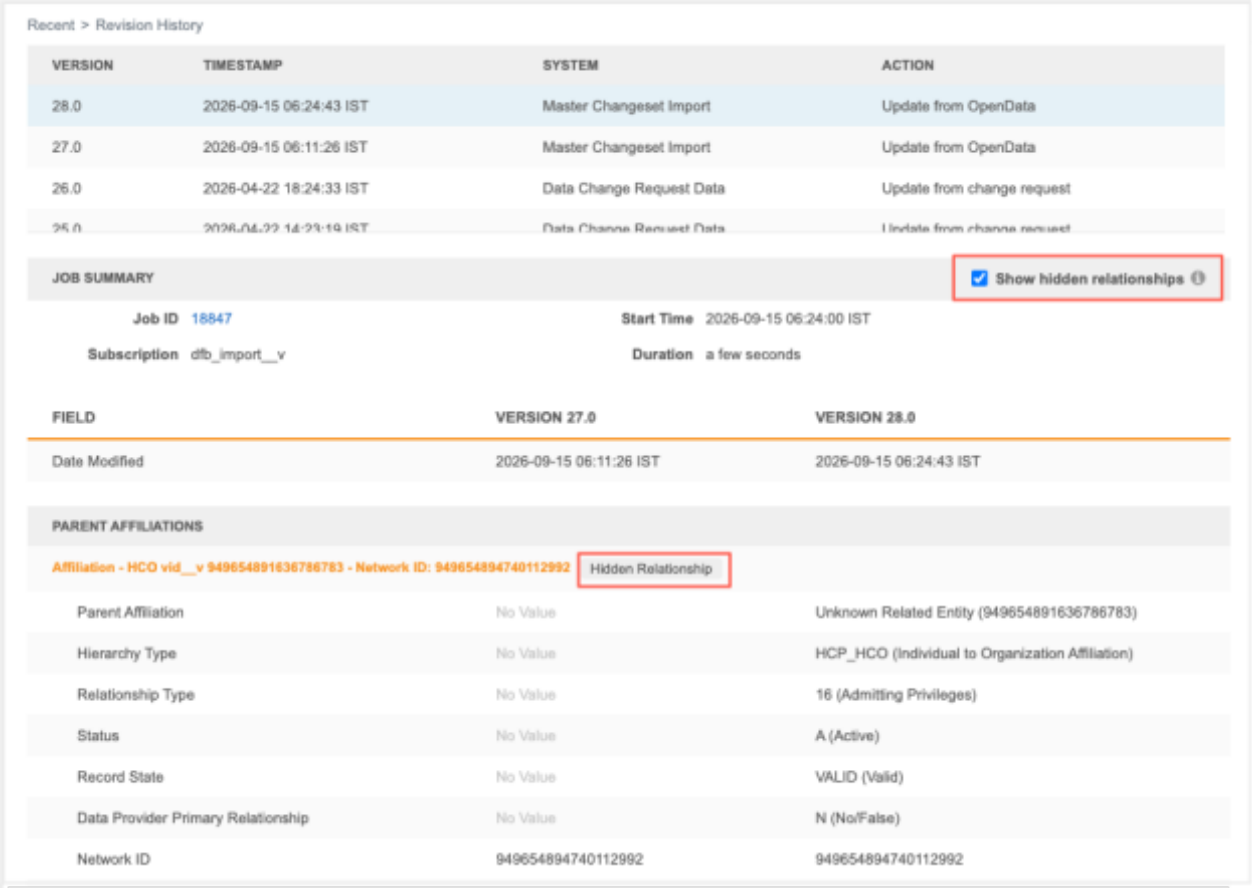



You can now view the details of the changes.

### *Show hidden relationships*

When the revision involves a change to a hidden relationship, the **Job Summary** section now displays the **Show hidden relationships** option. The option is off by default.

Select the option to display the details made to the parent affiliation in the OpenData master instance.




When the **Show hidden relationship option** is on, hidden relationships are tagged so you can quickly identify those relationships.

### *Impact to other Network MDM features*

Hidden relationships display only in the record's revision history.

They do not display in other features, including field revisions and revision history reporting.

## Search

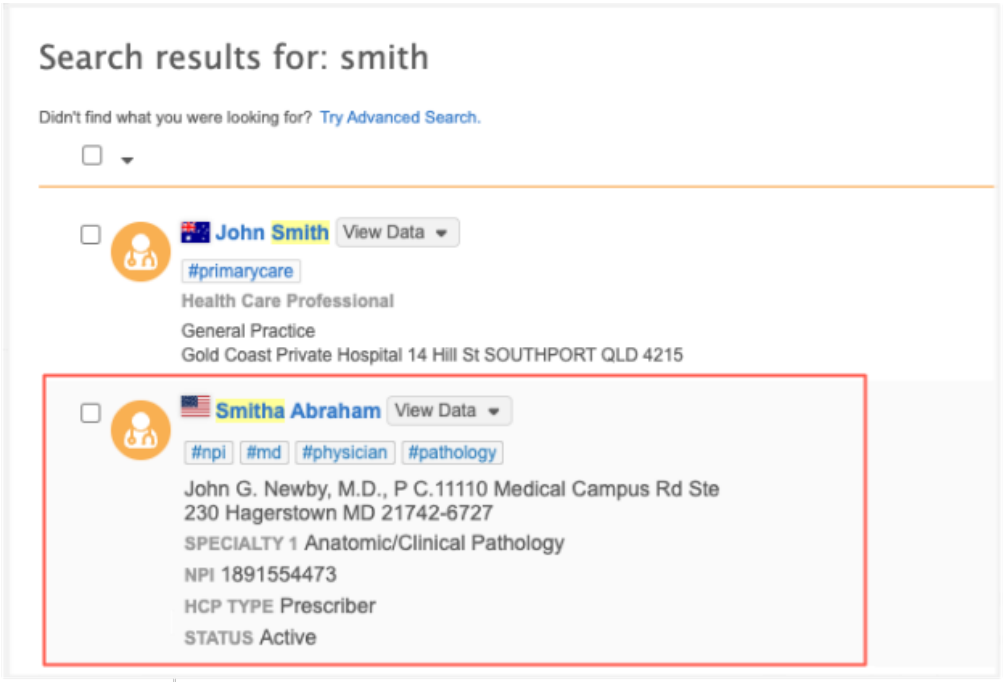
### CUSTOMIZE SEARCH RESULTS DISPLAY

26R2.1

Administrators can customize the fields to display in search results for different objects and countries. Replacing the default search result layout with country-specific details can help your users find and identify records faster.

**Example**

In this example, the search result for the US HCP uses a custom layout. The UK HCP result uses Network MDM's default search layout.




This feature is available by default in your Network instance. Administrators and Data Managers can define custom search result layouts.

### *Highlights*

- Administrators can customize how search results display for each object.
- Search layouts are customized by country by assigning the layout to data visibility profiles (DVPs). Multiple countries can be defined for each layout.
- A maximum of 10 fields can be added to the layout.
- The display order of the fields can be customized.
- All users using the same DVPs will see the same layout for each object/country combination.

### *Supported objects*

- Veeva standard objects (HCO, HCP)
- Custom objects

### *Supported fields*

All fields related to the object can be added to the search result layout.

- Main object fields
- Sub-object and relationship object fields

**Note:** The field does not display in the search result if the field value is empty on the record.

### *Supported search displays*

- Network Search - Quick search results
- Network Search - Search results page
- Parent HCO search on profiles and DCRs

### *Impact to existing search results*

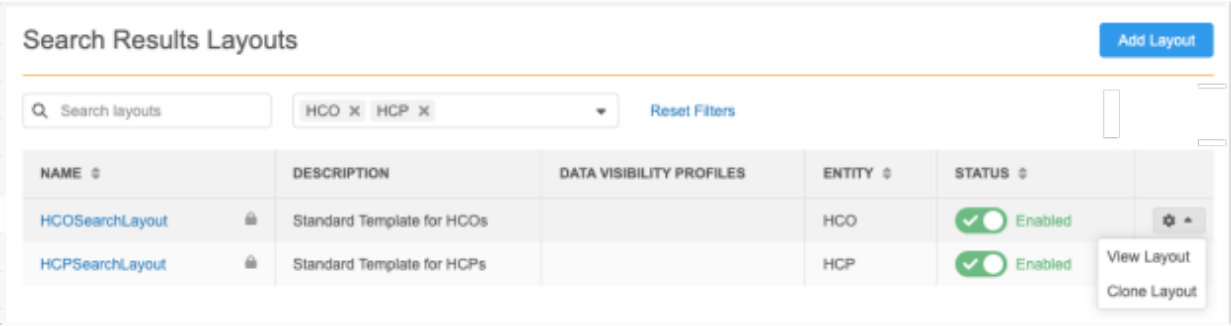
There is no impact to existing search results. The default layout displays until you customize it for an object.

Customizing the search result display does not impact the Network MDM search functionality; it changes only the way the results are displayed to users in the supported pages.

### *Default search layout*

If no search display is configured, the default search layout displays.

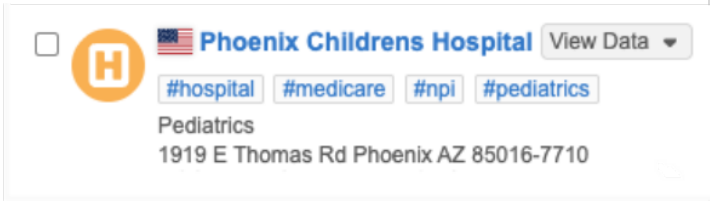
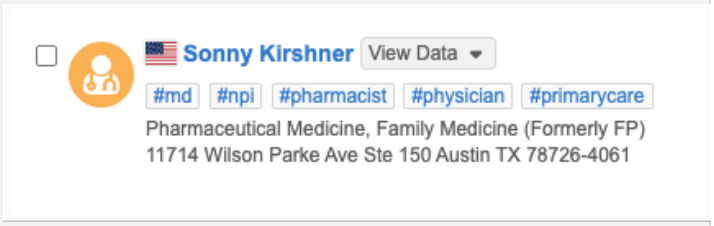
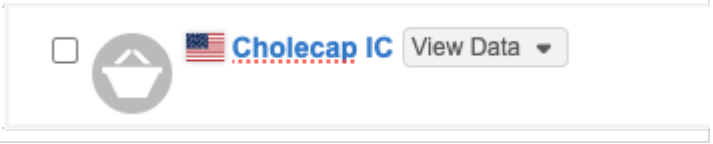
The Search Results Layouts feature contains a standard template for HCOs and HCOs. These layouts are read-only, but they can be cloned to give you a starting point for your custom layout.



### Default fields and display order for objects

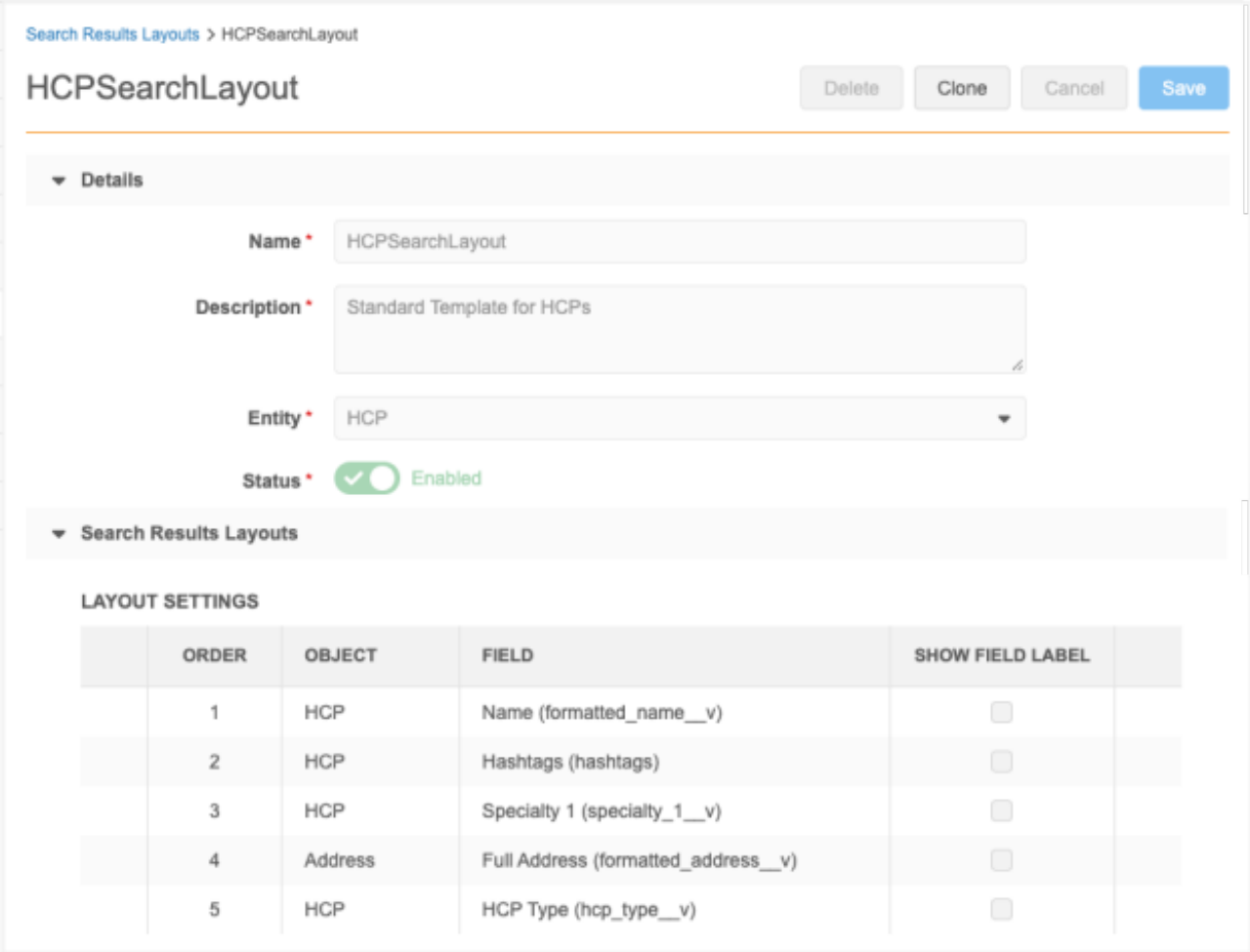
HCO, HCP, and custom objects have the following default display for search results.

**Note:** Country (flag icon) and object type (HCP/HCO/custom object icon) are always defined for each object.

| Standard Template | Default Fields | Example |
|---|---|---|
| **HCOs** | 1. Corporate Name<br>2. Hashtag<br>3. Specialty 1<br>4. Specialty 2<br>5. Full address (Rank 1/Network Calculated primary)<br>6. Key Networks |  |
| **HCPs** | 1. Formatted name<br>2. Hashtag<br>3. HCP type<br>4. Specialty 1<br>5. Specialty 1<br>6. Full address (Rank 1/Network Calculated primary) |  |
| **Custom Objects (no template)** | 1. Name |  |

The standard layouts apply to all countries.

**Example - Standard template for HCPs**



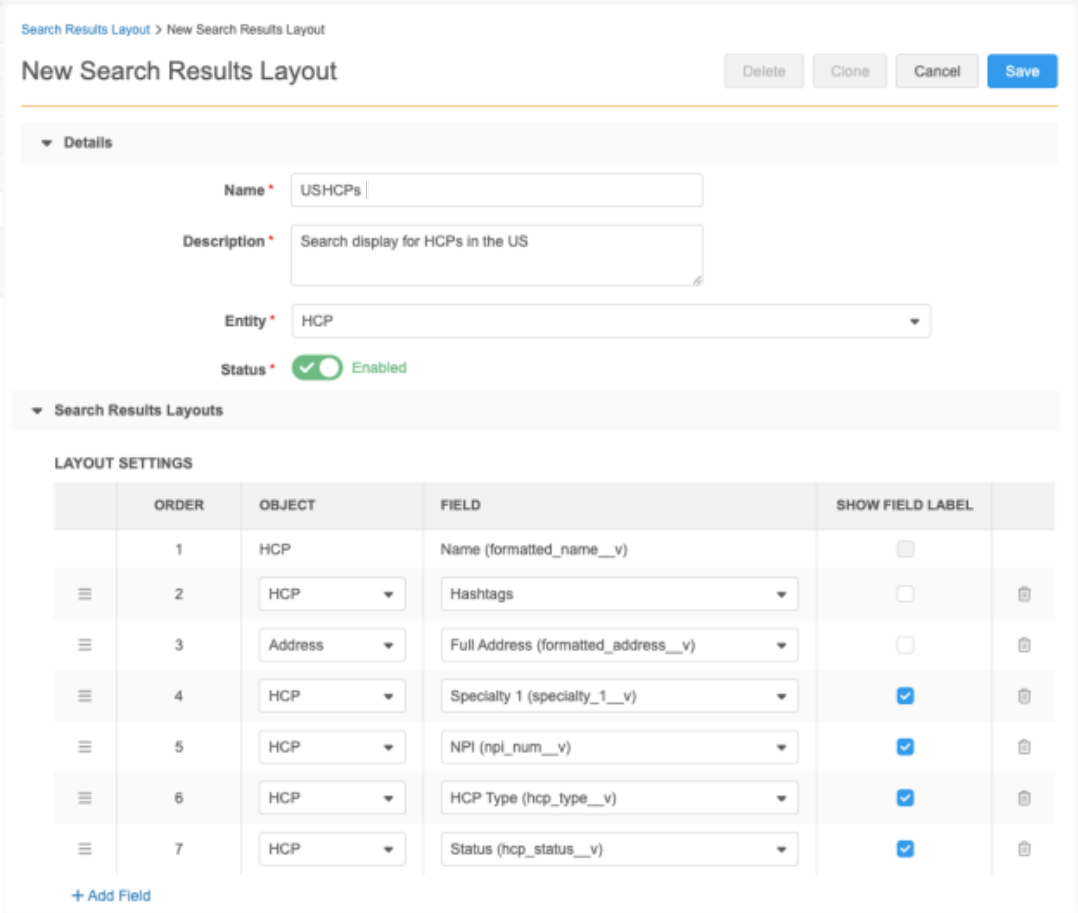

To customize the results by including different fields, defining the order in which the fields display, and applying it to objects for specific countries, create a custom search result layout.

### *Process for adding a search result layout*

- Create a Search Result Layout for an object.
- Assign the layout to a data visibility profile (DVP) so it applies to specific countries.
- Assign users to the DVP.

### *Configure a search result layout*

1. In the Admin console, click **Data Model > Search Results Layouts**.
2. Click **Add Layout**.
3. **Details** section - Define the following:
   - **Name** and **Description**
   - **Entity** - Choose the object that the layout applies to.
   - **Status** - The layout is enabled by default.
4. **Search Results Layout** - Choose the fields and the order that they should display.
   - **Object** - Choose the object that the field belongs to.
   - **Field** - Choose the field. The list is filtered for the defined object. Fields for all countries display.
   - **Show Field Label** - Select to add the field label to the search result. For example, HCP Type, Specialty.
   - **Reorder** - Use the **Handle** ≡ to move the fields into the desired position.
5. **Save** the layout.



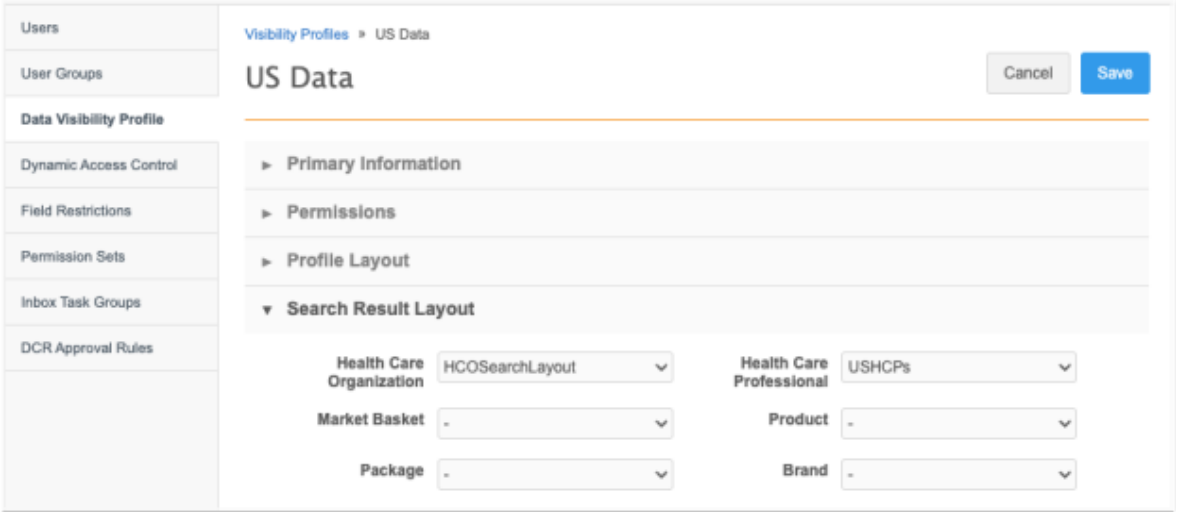

When the layout is ready, assign it to a data visibility profile. A search result layout can be assigned to multiple countries.

### *Assign the search result layout to a DVP*

Data visibility profiles determine the records that users can access. Assign the layout to the data visibility profiles that should use the layout so users will see the customized display for that country.

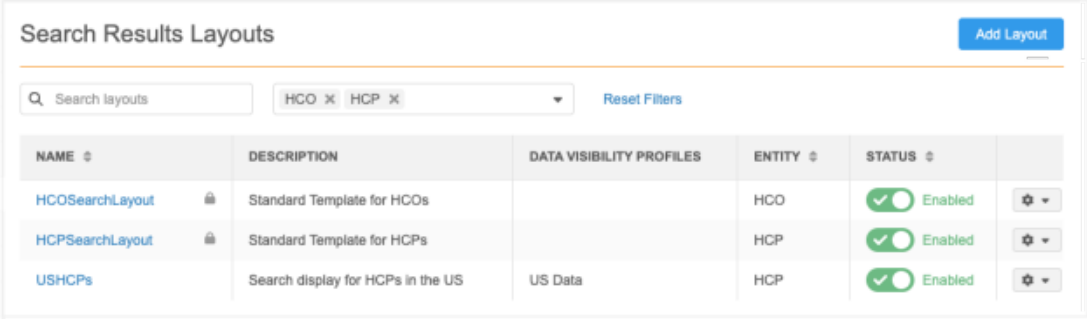
**Note:** An object can have only one layout for each country.

1. In the Admin console, click **Users & Permissions > Data Visibility Profile**.
2. Open a DVP.
   A new section called **Search Result Layout** section is added to all DVPs.
   It includes all enabled objects in your Network MDM instance.
   For HCPs and HCOs, the default layouts are defined, `HCOSearchLayout`, `HCPSearchLayout`.
3. Expand the object and choose the custom layout.




4. **Save** your changes.

   The Search Results Layouts page is updated to identify the DVPs assigned to the custom layout.




### *Assign users to the DVP*

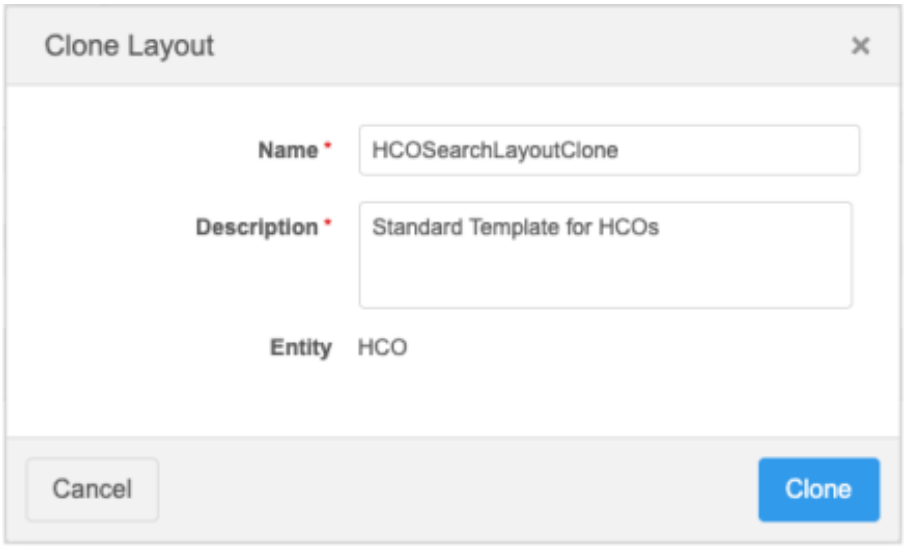
Each user account contains a **Data Visibility Profile** section. Assign the DVP to the user so they will see the search result layout display for that country.

### *Clone layouts*

Any search layout can be cloned so you don't have to start over each time.

For example, if you want to create a layout similar to the Standard Template for HCOs, clone the layout.

1. On any layout configuration, click **Clone**.
2. In the **Clone Layout** pop-up, change the default **Name** and **Description** so it is meaningful for the new layout.




3. Click **Clone**.
4. In the **Layout Settings** section, make the changes to customize it.
5. **Save** your changes.

### *Logs*

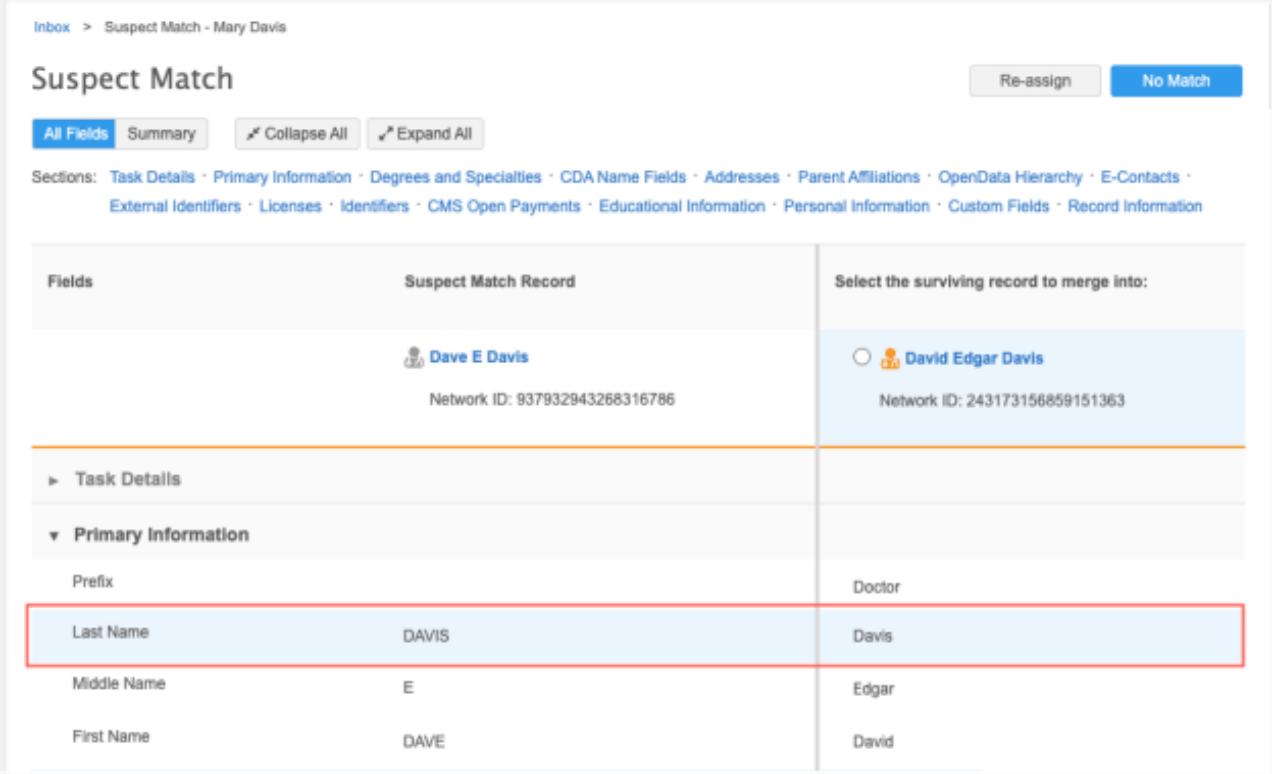
The System Audit Log tracks all new layouts and changes to existing layouts.

## Inbox

### SUSPECT MATCH TASKS

26R2.1

Matching field values containing different letter cases are now highlighted to help Data Stewards easily identify these matches. Previously, match highlighting was case-sensitive.




This enhancement is enabled by default.

## CDA data model

### SUPPORTED COUNTRIES

26R3

Hong Kong and Macao now support the Common Data Architecture (CDA) data model.

This enhancement is enabled by default if you have the CDA data model settings enabled in your Network MDM instance.

For details see Common Data Architecture (CDA) data model topic in the *Veeva Network MDM Online Help*.

#### *Fields*

The CDA fields are existing fields, so they are not managed by Veeva OpenData by default.

If you want the fields to be managed by Veeva OpenData, move them to the **Managed by OpenData** pane in your Hong Kong and Macao country subscriptions.

> **Important**: Before enabling the fields for OpenData, migrate any local data that you have loaded to the fields for these countries.

To quickly find the CDA fields in the Customer Master domain (**Data Model**), filter each object using the country and **CDA** data model schema tag or export the data model and filter the file.

#### *Reference data updates*

Reference codes have been added for Hong Kong and Macao. See the *Veeva Network MDM 26R3.0 Data Governance* document for details.

Administrators and Data managers can view the reference codes in the Network MDM UI (**Data Model > Reference Data**).

## OpenData 2.0 data model

### SUPPORTED COUNTRIES

26R3

Hong Kong and Macao now support the OpenData 2.0 data model.

This enhancement is enabled by default if you have the OpenData 2.0 data model settings enabled in your Network MDM instance.

For details see OpenData 2.0 data model topic in the *Veeva Network MDM Online Help*.

### *Fields*

The OpenData 2.0 fields are existing fields, so they are not managed by Veeva OpenData by default.

If you want the fields to be managed by Veeva OpenData, move them to the **Managed by OpenData** pane in your Hong Kong and Macao country subscriptions.

> **Important**: Before enabling the fields for OpenData, migrate any local data that you have loaded to the fields for these countries.

To quickly find the OpenData 2.0 fields in the Customer Master domain (**Data Model**), filter each object using the country and **OpenData 2.0** data model schema tag or export the data model and filter the file.

### *Reference data updates*

Reference codes have been added for Hong Kong and Macao. See the *Veeva Network MDM 26R3.0 Data Governance* document for details.

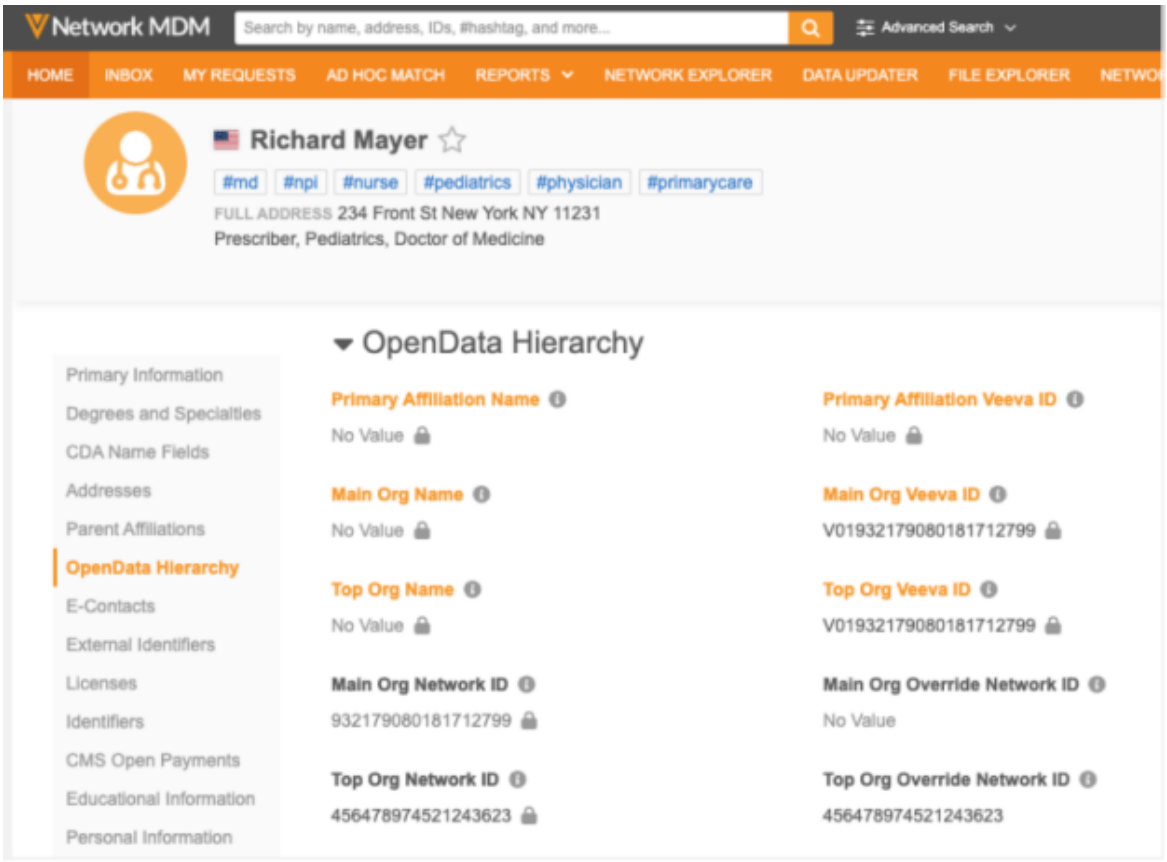
Administrators and Data managers can view the reference codes in the Network MDM UI (**Data Model > Reference Data**).

## TOP AND MAIN ORG CUSTOM FIELDS

26R3

Network MDM now provides four new custom fields that store Main Org and Top Org data as Network IDs, so this data can be sent to Vault CRM. CRM users can view the Main Org and Top Org on HCP and HCO records and use it to search for and download related records.

If your Main Org or Top Org are different from what OpenData has set, you can override it with your own Network ID value.




### *Enable the fields*

The four new fields are enabled by default in new Network MDM instances.

Existing customers can enable the fields for the HCP and HCO objects (**Data Model**).

### *Supported countries*

The fields are added for countries that are supported for the OpenData 2.0 data model.

For a detailed list of countries, see the OpenData 2.0 data model topic in the *Veeva Network Online Help*.

### *Top/Main Org Veeva ID fields*

OpenData provides values for Top Org and Main Org in the following OpenData 2.0 fields:

- **Main Org Veeva ID** (`main_org_veevaid__v`)
- **Top Org Veeva ID** (`top_org_veevaid__v`)

These fields use the 21-digit Veeva ID that cannot be sent to Vault CRM. The fields are managed by OpenData and cannot be changed through data change requests.

### *New custom fields*

Four fields have been added to the data model for HCP and HCO objects.

These are customer-managed fields that use the 18-digit Network ID.

| Field Name | Field Label | Details |
|---|---|---|
| `main_org_network_vid__v` | Main Org Network ID | This field is read-only because it is calculated from one of the following fields:<br>- Main Org Veeva ID (`main_org_veevaid__v`)<br>- Main Org Override Network ID (`main_org_override_vid__c` )<br><br>This is the value sent to Vault CRM. |
| `main_org_override_vid__c` | Main Org Override Network ID | Add your custom value to this field to override the calculated Main Org Network ID field.<br><br>This field can be updated through change requests and data loading. |
| `top_org_network_vid__v` | Top Org Network ID | This field is read-only because it is calculated from one of the following fields:<br>- Top Org Veeva ID (`top_org_veevaid__v`) (<br>- Top Org Override Network ID (`top_org_override_vid__c` )<br><br>This is the value sent to Vault CRM. |
| `top_org_override_vid__c` | Top Org Override Network ID | Add your custom value to this field to override the calculated Top Org Network ID.<br><br>This field can be updated through change requests and data loading. |

### View the fields on record profiles

The fields are not added to profile layouts. To view the fields on record profiles, add them to your custom profile layouts. Standard profile layouts are read-only.

### *Overriding the OpenData Main Org or Top Org field value*

If your Main Org or Top Org relationship differs from OpenData has set, use the **Main Org Override Network ID** and **Top Org Override Network ID** fields to define a different Network ID.

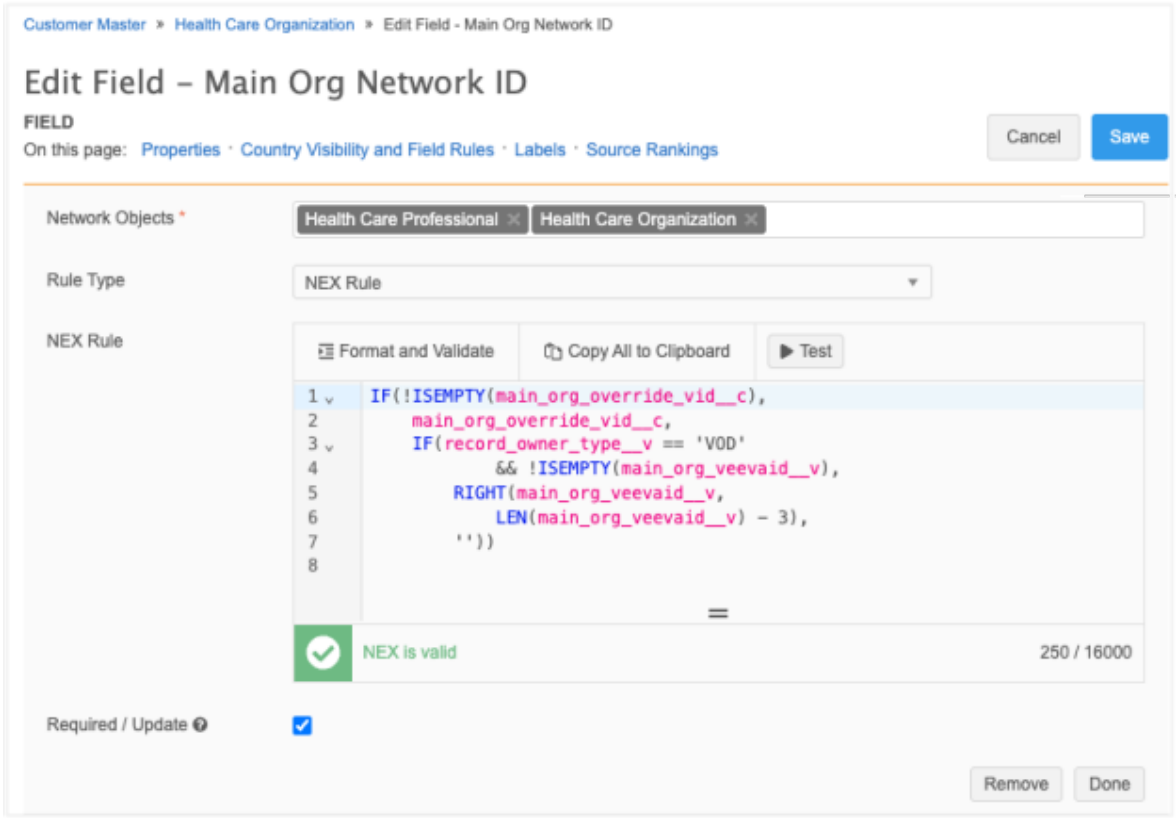
The value in the **Main/Top Org Override Network ID** field always takes priority over the Network ID calculated from the **Main/Top Org Veeva ID** field.

### *Calculating the Top/Main Org Network ID field*

Network Expression (NEX) rules automatically calculate the **Main Org Network ID** and **Top Org Network ID** fields.

The field configuration includes the default NEX rule. You can change the rule to fit your own business logic.

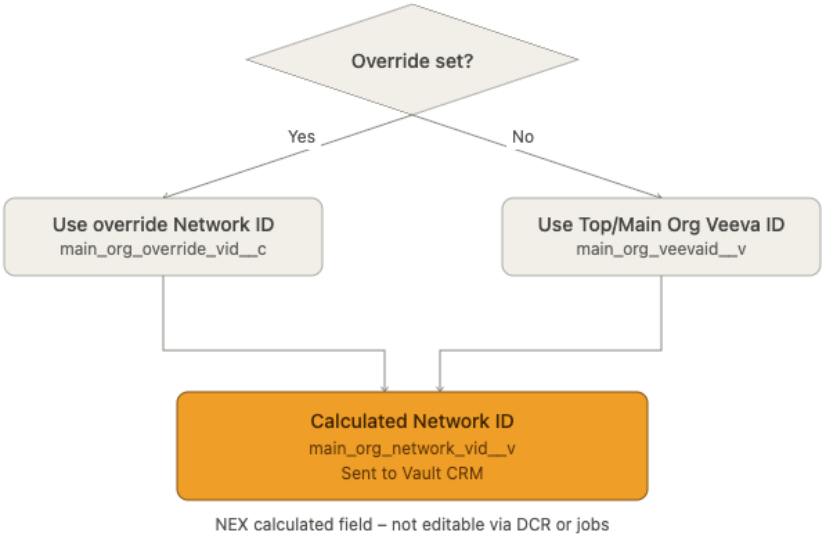
**Note:** If the default NEX rule is changed, it cannot be restored.



### Calculation process

The default NEX rule calculates the value of the **Main/Top Org Network ID** field using the following process:

- If a value exists in the custom **Top/Main Org Override** field, populate that value in the **Main/Top Org Network ID** field.
- Otherwise, if OpenData has set a value in the **Top/Main Org Veeva ID** field, remove the first 3-digits from the Veeva ID and populate that value in the **Main/Top Org Network ID** field.
- If neither condition applies, the **Top/Main Network ID** field value remains empty.




### *Vault CRM integration*

The following fields must be mapped between Network MDM and CRM.

| Network Field | Field Name | CRM Field Type | Mapped CRM Field |
|---|---|---|---|
| `main_org_network_vid___v` | Network Main Org ID | Object Reference | main_org__v |
| `top_org_network_vid__v` | Network Top Org ID | Object Reference | top_org__v |

Top Org and Main Org data is pushed to Vault CRM using the Veeva Vault Connector.

## DCR FOR CALCULATED MULTIVALUED REFERENCE FIELDS

26R3

Data change requests are supported for most reference fields that support multiple values. In this release that support is extended to OpenData 2.0 fields and CDA fields whose values are calculated from their associated individual fields.

**Supported fields**

| Field Name | Field Label | Calculated From Fields | Object | Data Model |
|---|---|---|---|---|
| all_spec_cda__v | All Specialties (CDA) | specialty_1__v to specialty_10___v | HCP | CDA, OpenData 2.0 |
| all_degree_cda__v | All Medical Degrees (CDA) | medical_degree_1__v to medical_degree_5__v | HCP | CDA, OpenData 2.0 |
| all_spec_local__v | All Specialties Local | spec_1_local__v, spec_2_local__v | HCP, HCO | OpenData 2.0 |

**Note:** The **All Specialty Groups** (all_spec_group_cda__v) field is not supported for DCRs. The field values are calculated from the values in the all_spec_cda__v field. DCRs for this read-only field are automatically rejected.

### *Enable this enhancement*

This enhancement is enabled by default if the CDA / OpenData 2.0 data model is enabled in your Network MDM instance.

### *Submitting DCRs*

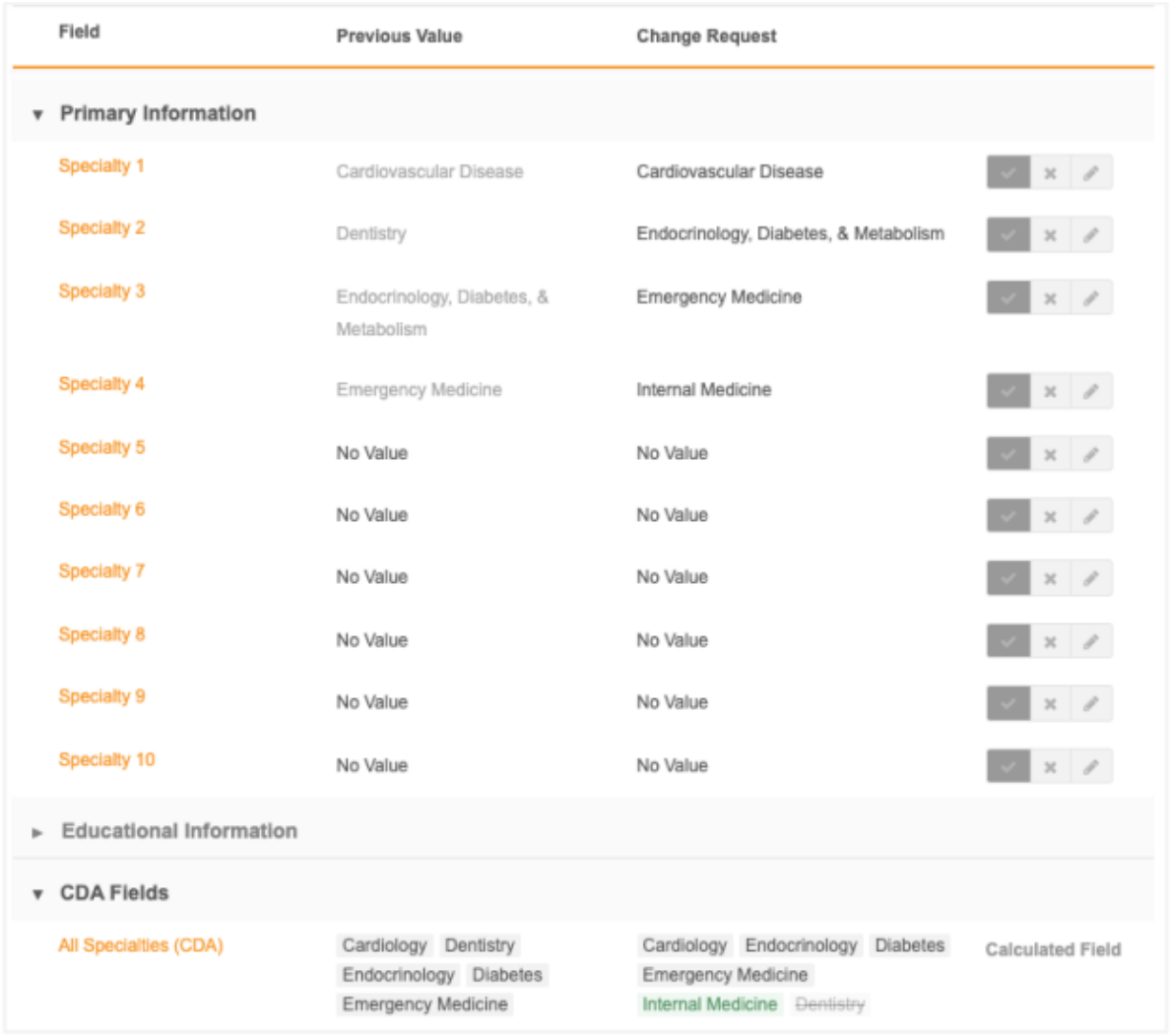
DCRs are supported from integrations (for example, Vault CRM) using the Network MDM API.

**Note:** Submitting DCRs through Network widgets for these fields is not supported.

### *Stewarding DCRS*

When DCRs are submitted for multivalued fields, data stewards will verify and process the associated individual fields on the inbox task. The values on the multivalued field are distributed to the individual fields based on the order in the field.

For example, if Cardiology is listed first for the All Specialties (CDA) field, then the Specialty 1 field is populated with Cardiology. Data stewards will process Specialty 1 on the task.




## Order of values

Downstream systems like Vault CRM typically sort multivalued field values alphabetically. When a data change request is processed, Network MDM preserves the original priority order of the values.

- Values in the current list keep their existing order.
- New values submitted on the DCR are appended to the end.
- Values removed through the DCR are removed from the order and the subsequent values are moved up.

## Discarding excess values

If DCRs submit more values than there are associated individual fields, the extra values are discarded. For example, if All Specialties (CDA) is changed to 12 values, the last two values are discarded because there are only 10 individual Specialty fields.

## IQVIA OneKey Connector

The Connector is a bi-directional connection with IQVIA® OneKey that seamlessly integrates OneKey as your third-party data provider for HCOs and HCPs within Network MDM.

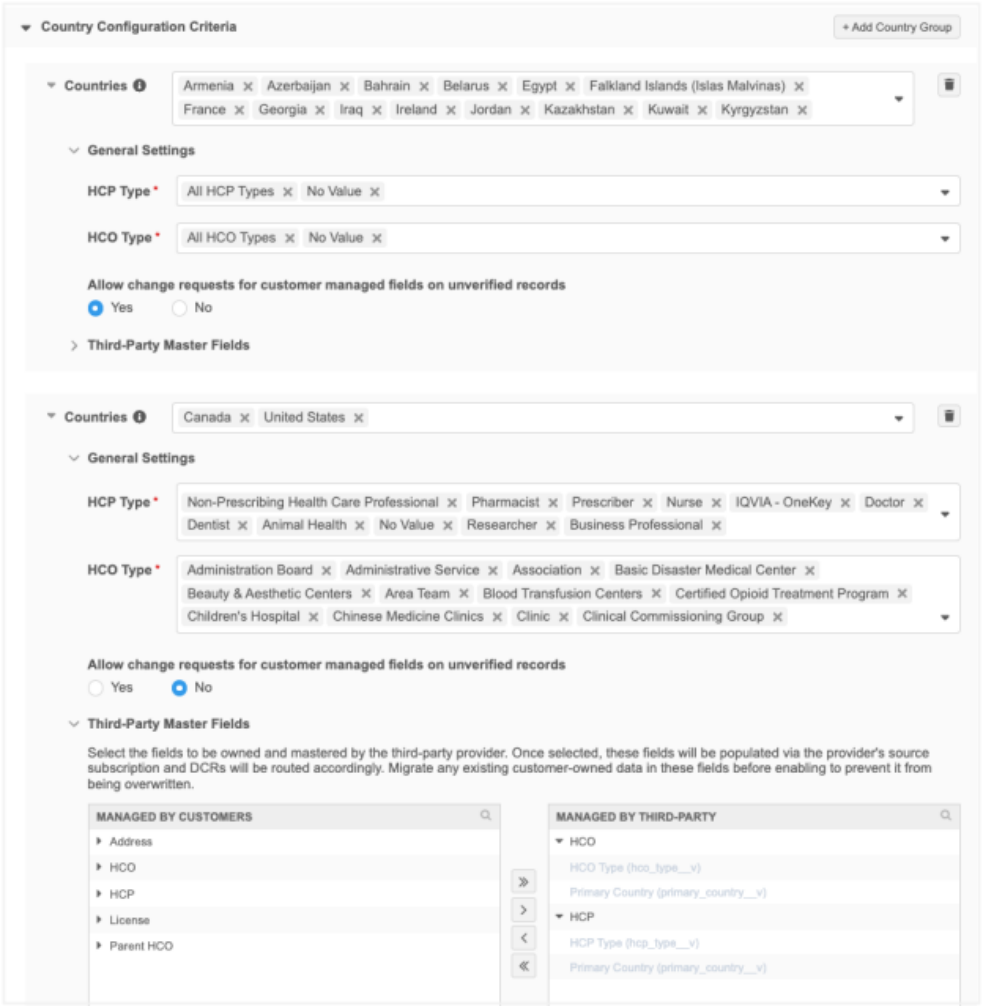
The following enhancements have been added in this release. All enhancements are enabled by default.

**Important**: A third-party agreement (TPA) must be in place before OneKey data can be loaded into Veeva Network MDM.

### IQVIA OneKey system support for country groups

26R2.1

Third-party master systems, including your IQVIA OneKey system, now support multiple country-specific configurations. Using country groups, administrators can define record management and field ownership rules for different countries within a single system.



**Important**: All countries mastered by IQVIA OneKey must be included in the system configuration. Data loading and API access now validates that the country is managed by IQVIA using this system. For details, see the Validate countries during data load and Record access in the Search and Retrieve APIs topics below.

### *Supported systems*

Country groups are supported for the following system types:

- IQVIA OneKey
- Custom systems defined as third-party master

### *Create a country group*

Use a country group to define the records and fields that will be managed for specific countries.

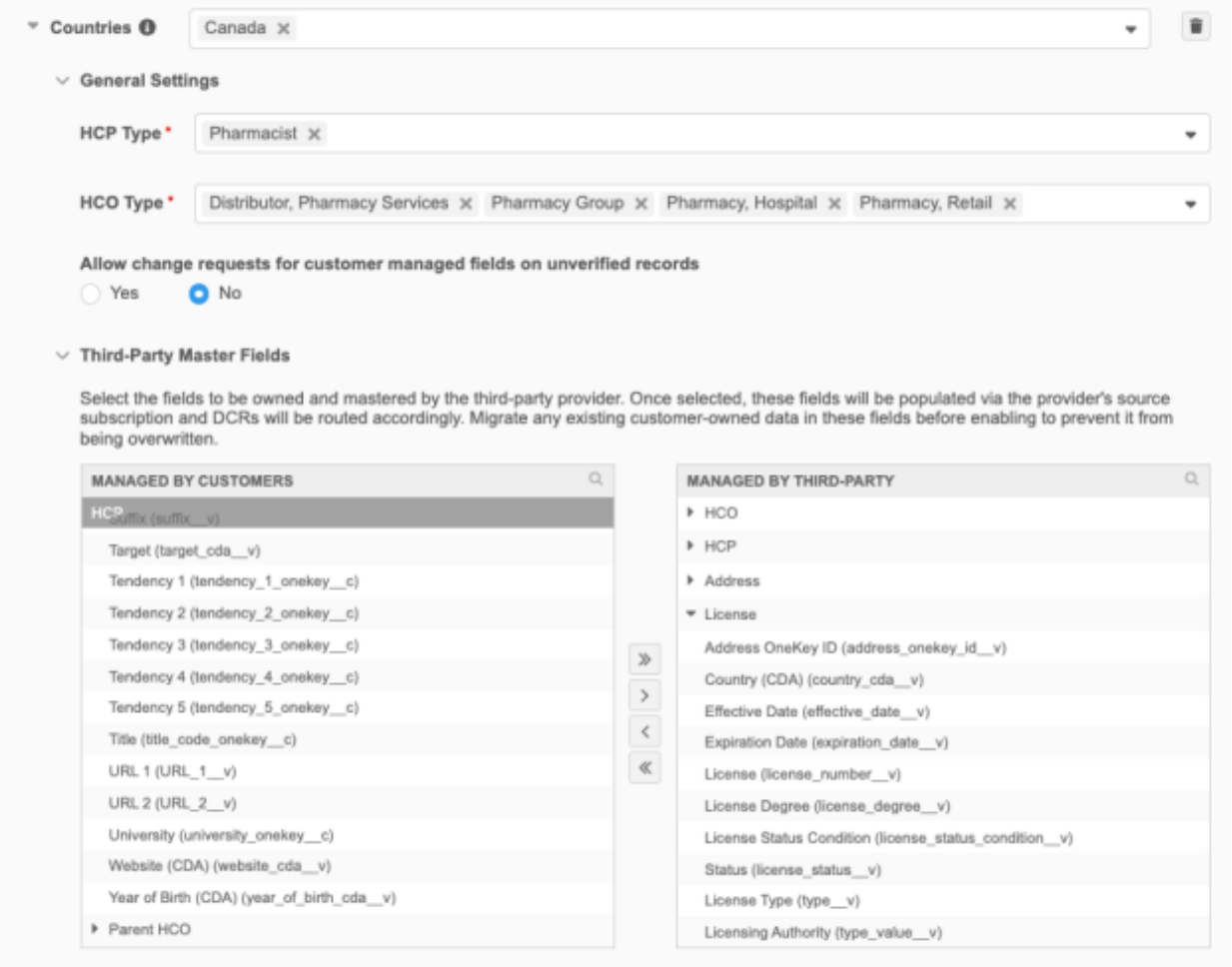
1. In the IQVIA One-Key system, click **Add Country Group**.
   Define the following settings:
2. **Countries** - Select one or more countries to add to the group.
   A country can belong to only one group within the same third-party system. Countries that are managed by Veeva OpenData cannot be added.
3. **General Settings** - Choose the HCPs and HCOs by type that will be managed by IQVIA for these countries.
4. **Allow change requests for customer managed fields on unverified records** - Route DCRs for customer managed fields on unverified IQVIA records to be sent to local data stewards.

   This is helpful when users want to add information to a new record but the record is still pending approval from IQVIA.
5. **Third-Party Master Fields** - Define the fields that will be managed by IQVIA for the countries in the group. Changes to fields in the **Managed by Third-Party** pane will be routed to IQVIA to process.

   To define the fields as IQVIA-managed, move the fields from the **Managed by Customer** pane to the **Managed by Third-Party** pane.

   Some fields are automatically moved to the **Managed by Third-Party** pane when the objects are defined as IQVIA-managed.
6. **Save** your changes or click **Add Country Group** to create another group.

**Example**



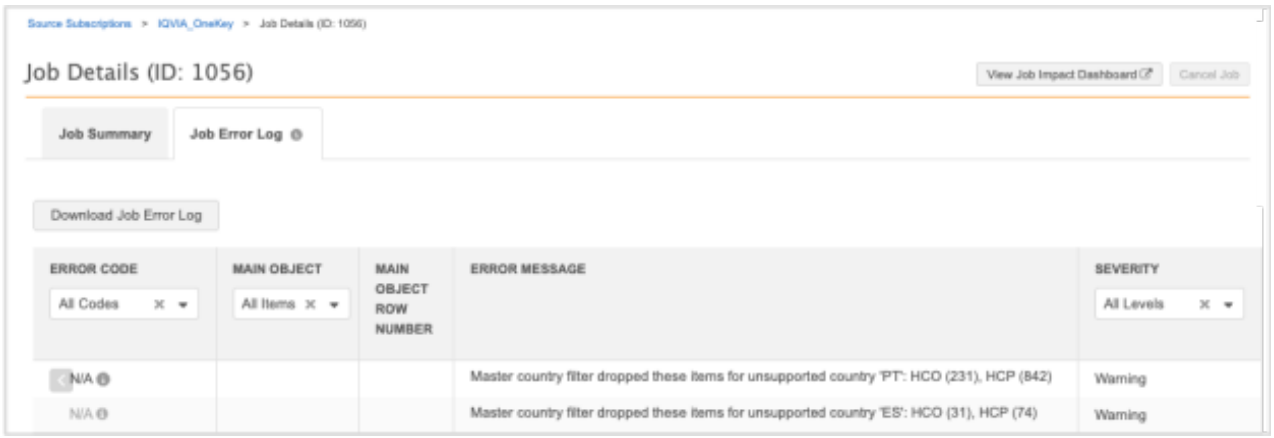

### *Existing IQVIA OneKey systems*

If you have a system configured, a country group is created for the existing countries, HCP, HCO, and field settings.

## VALIDATE COUNTRIES DURING DATA LOAD

26R2.1

Records that are loaded for the IQVIA-OneKey system are now validated to ensure that the country is managed by IQVIA. If a country is not included in the IQVIA-OneKey system configuration, the record is not loaded. The Job Error Log displays a warning for each country with skipped records.




### *Supported systems*

The country validation applies to IQVIA OneKey systems only.

### *Job warnings*

When a record is loaded for the IQVIA OneKey system and the country is not managed by IQVIA, it could be for one of the following reasons:

- The country field (`country_cda__v`) is not defined for the record in the source file.
- The country is not included in the IQVIA OneKey system configuration.

If the country cannot be validated, the record is not loaded into your Network MDM instance.

The Job Error Log displays the following warning for each country with skipped records.

| Error Code | Explanation | How to Resolve |
|---|---|---|
| N/A | Master country filter dropped these items for unsupported country <*'country_code'*> : HCO <*total_count*> , HCO <*total_count*> | Assign the country to a country group in the IQVIA OneKey system configuration or remove these records from the source file. |

One warning occurs for each country.

The warning does not fail the job. The job can complete. Review the warning details and add the country to your IQVIA system configuration if required.

## RECORD ACCESS IN THE SEARCH AND RETRIEVE APIS

26R2.1

Integration users searching for and retrieving records using the IQVIA OneKey system will only see the records from countries included in the IQVIA OneKey system configuration.

By automatically filtering API results to match your IQVIA OneKey system configuration, integration users receive cleaner, more focused responses containing only the exact country data they need. This built-in safeguard also protects data integrity by ensuring non-IQVIA records are never unintentionally exposed.

### *Supported APIs*

OneKey records are filtered for the following APIs:

- Search
- Retrieve

  (Retrieve Entity, Retrieve Child Entity, Batch Retrieve Entities, Batch Retrieve Child Entities, Retrieve HCO, Retrieve HCP)

### *Supported systems*

Filtering is supported for all third-party master systems, including your IQVIA-OneKey system.

For all other systems, records and fields are not filtered from the API response.

**Important**: If the Integration User has API access to all systems through their user profile, no record filtering is applied.

### *Required permissions to access records*

To access IQVIA-managed records and fields for a country, the following configurations are required:

#### Integration User

The user profile must have the following settings defined:

- **Data visibility profile (DVP)** - Must be assigned to the DVP for that country
- **API access** - Must have access to the IQVIA-OneKey system

#### IQVIA OneKey system

- Must have the country defined in a country group

**Example access scenarios**

In this example, the Integration User needs to search for and retrieve IQVIA-managed records for France. The required configurations must be defined to access those records in the API.

| Scenario | Integration User's User Profile | | IQVIA OneKey System | Access to Country Records in the API? |
|---|---|---|---|---|
| | API access to IQVIA OneKey system? | Assigned to France DVP? | Country Group Contains France? | |
| 1 | Yes | Yes | Yes | Yes |
| 2 | Yes | Yes | No | No access |
| 3 | Yes | No | Yes or No | No access |
| 4 | No | Yes or No | Yes or No | No access |

**Result**

Only Scenario 1 provides access to the IQVIA-managed records for France.

If users search for a record they don't have access to, the API response contains only the Network ID for Search or an `Insufficient Access` error for Retrieve.

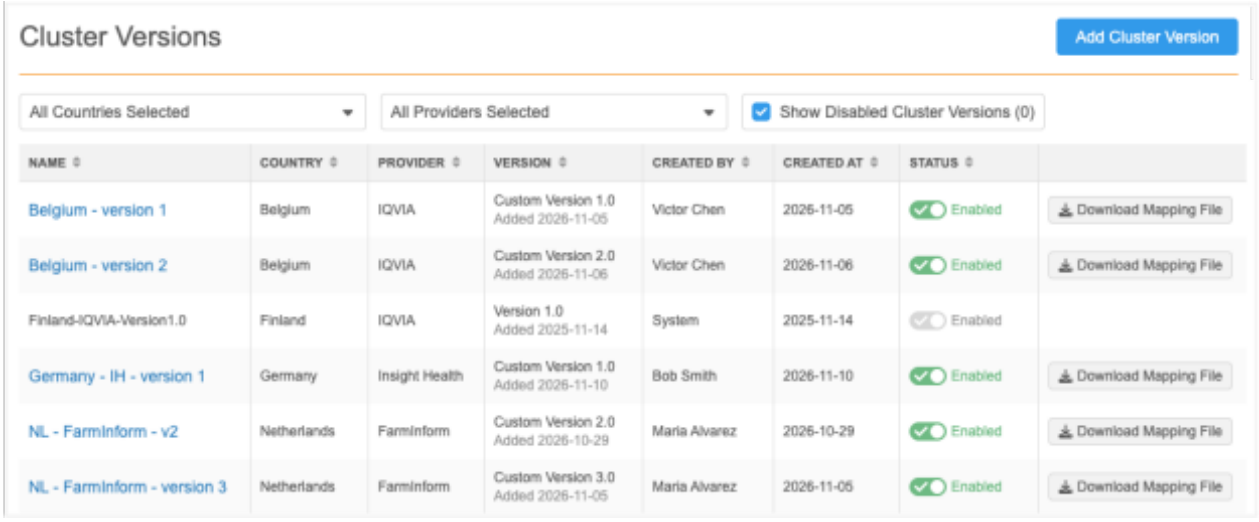
## Data model

### CLUSTER MANAGEMENT

26R3

Administrators can now upload mapping files from their brick provider to create custom cluster versions on demand, rather than waiting for the next Network MDM release cycle.

Custom cluster versions are exclusive to your Network MDM instance and are not accessible to other customers.




This feature is enabled by default if the Cluster Management feature is enabled in your Network MDM instance.

#### *Supported cluster providers and countries*

Custom cluster versions are supported for providers that have brick mappings based on postal codes. These mappings can be uploaded as .csv files to create a new version.

The following existing country/cluster provider configurations are supported.

| Country | Cluster Provider |
|---|---|
| Australia (AU) | IQVIA |
| Belgium (BE) | IQVIA |
| Canada (CA) | IQVIA |
| Czechia (CZ) | IQVIA |
| Denmark (DK) | Signum |
| Germany (DE) | IQVIA, Insight Health |

| Country | Cluster Provider |
|---|---|
| Finland (FI) | IQVIA, Signum |
| Greece (GR) | IQVIA |
| Hungary (HU) | IQVIA |
| Mexico (MX) | IQVIA |
| Netherlands (NL) | FarmInform, IQVIA |
| Norway (NO) | FarmaStat, IQVIA, Signum |
| Poland (PO) | IQVIA |
| Portugal | HMR |
| Romania (RO) | IQVIA |
| Russia (RU) | IQVIA |
| Slovakia (SK) | IQVIA |
| Sweden (SE) | IQVIA, Signum |
| Switzerland (CH) | IQVIA SM Service Marketing |
| United Kingdom (UK) | IQVIA |

### Not supported

- All country/provider configurations with brick mappings that are not based on postal codes (for example, brick mappings based on geolocation).

  Custom cluster versions are not yet available for country/provider configurations where brick mapping are not based on postal codes. For these configurations, new cluster versions must still be created and released by Network MDM.

- South Korea (KR) - IQVIA and Spain (ES) - IQVIA

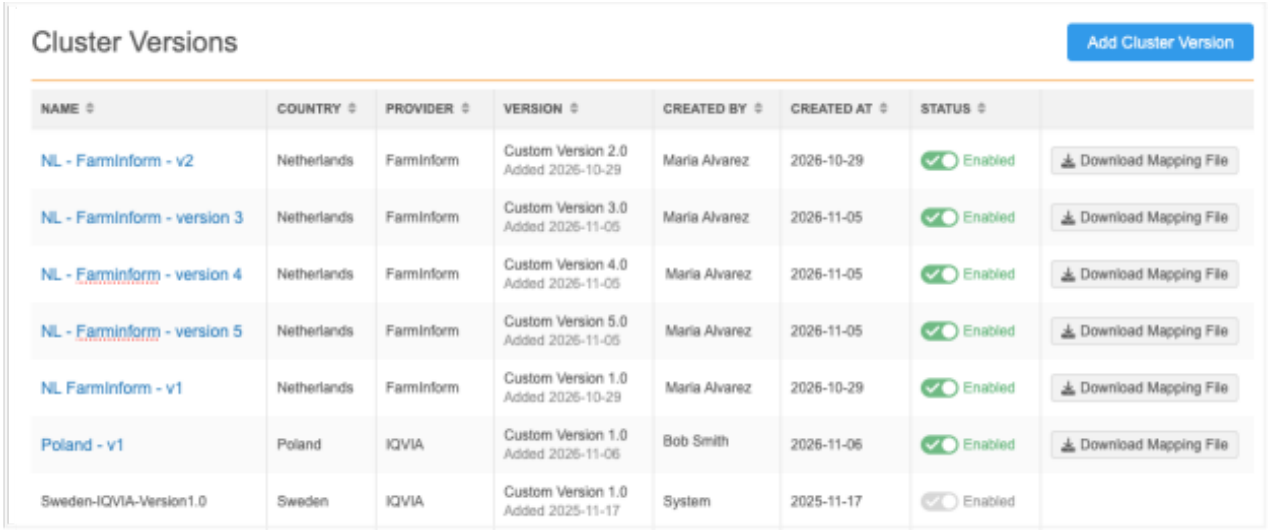
If you require a country/provider cluster configuration that is currently not supported, contact Veeva Support.

### *View cluster versions*

If you use cluster management in your Network MDM instance, the existing cluster versions currently in use are listed on the new Cluster Version page (**Data Model**).

**Note:** Cluster Management is not enabled by default. It must be enabled by Veeva Support after your third-party agreement (TPA) with the cluster provider is verified.

All Veeva-managed versions currently in use and custom versions display.




For each cluster version, the following details are available:

| Column Name | Details | Veeva-Managed Versions | Custom Versions |
|---|---|---|---|
| **Name** | The cluster version name. | Naming convention: *<country>-<provider>-<version number>*.<br><br>Example: `Belgium-IQVIA-Version1.0`. | *<custom_name>* |
| **Provider** | Cluster provider. | | |
| **Version** | The version number for the cluster versions in your Network MDM instance. Includes the date that the version was added. | Example: Version 1.0 | Example: Custom Version 1.0 |
| **Created By** | The user that added the version. | System | *<user name>* |
| **Created At** | The date the version was added. | Created date | Created date |
| **Status** | Enabled or Disabled | Enabled by default and cannot be disabled | Enabled by default |

| Column Name | Details | Veeva-Managed Versions | Custom Versions |
|---|---|---|---|
| **(Downloads)** | Download the mapping file that created the version so you can view the original brick mapping. | Not available | **Download Mapping File** button displays |

### Sort the list

By default, the versions are sorted alphabetically by the cluster version name.

You can filter the list by the **Country** and **Provider**.

### *About Veeva-managed cluster versions*

- **Read-only** - Cannot be edited or deleted.
- **Disabling** - Cannot be disabled. However, when you add a custom version for the country/provider, the Veeva-managed version is removed automatically. When the Veeva-managed versions are removed, they no longer display in the list and cannot be used in your Network MDM instance.
- **Availability** - Only Veeva-managed versions currently in use are available after Network MDM 26R3.0. Versions that are not in use will be removed from the cluster configuration and will not display on the Cluster Versions page.

### *Prerequisites*

To create a cluster version, the following actions are required:

1. Obtain a valid third-party agreement with the cluster provider that allows you to upload the mapping file to Veeva Network MDM.
2. Receive the mapping file from the cluster provider.
3. Convert the original mapping file from the provider into an uploadable .csv format.
4. Ensure that the formatting and data requirements are met.

   **General requirements**

   - **Format** - .csv
   - **Header** - none
   - **Encoding** - Unicode (UTF-8)
   - **Delimiter** - comma (,)
   - **Text qualifier** - enclose all values with a text qualifier (for example, double quote (")) 

   **Country requirements**

   Each country/provider configuration has a specific format. The format is set with the initial version of the cluster version.

   Review the Help Guide for each country/provider combination.

### *Add a custom cluster version*

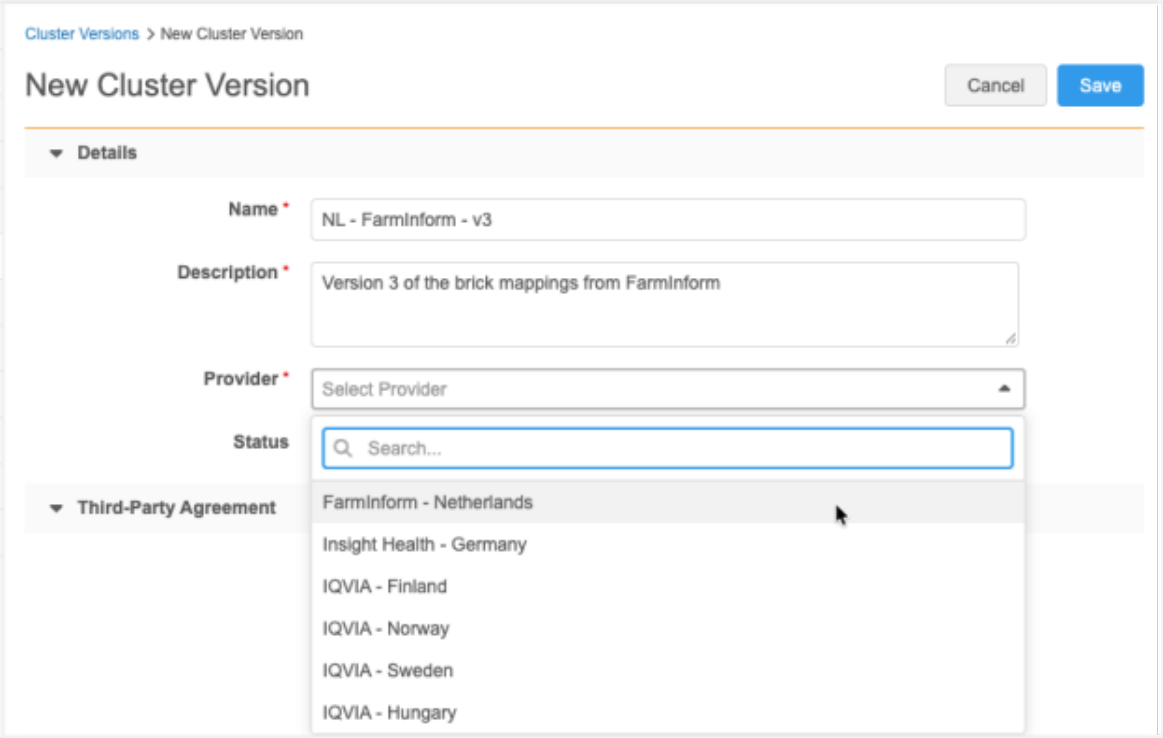
New cluster versions should be created in your Network MDM Sandbox instance so you can test them before adding them to your Production instance.

To add a cluster version:

1. In the Admin console, click **Data Model > Cluster Versions.**
2. Click **Add Cluster Version**.
3. **Details** section:
    - **Name** - Create a meaningful name that, for example, includes the cluster provider, country, and a version number or the year for which the brick structure is valid.
    - **Description** - Add details.
    - **Provider** - Expand the list and choose the cluster data provider/country combination.

      The list displays all cluster provider/country combinations that are enabled for your instance and that support the creation of custom cluster versions.

    - **Status** - The version is enabled by default.



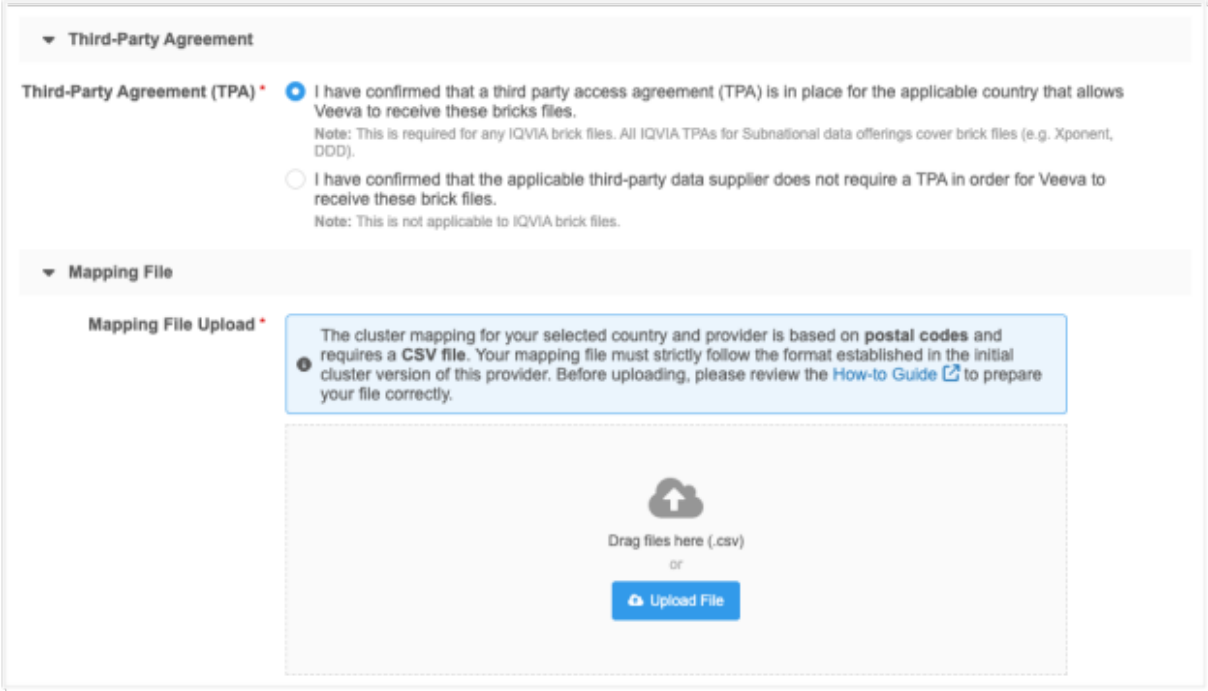
4. **Third-Party Agreement** section - Confirm that you are allowed to share the cluster provider's brick mappings with Veeva.

   Options:

   - **I have confirmed that a third-party access agreement (TPA) is in place for the applicable country that allows Veeva to receive these brick files**.

     **Important**: This is required for any IQVIA brick files. All IQVIA TPAs for Subnational data offerings cover brick files, for example Xponent and DDD.

   - **I have confirmed that the applicable third-party data supplier does not require a TPA in order for Veeva to receive these brick files**.

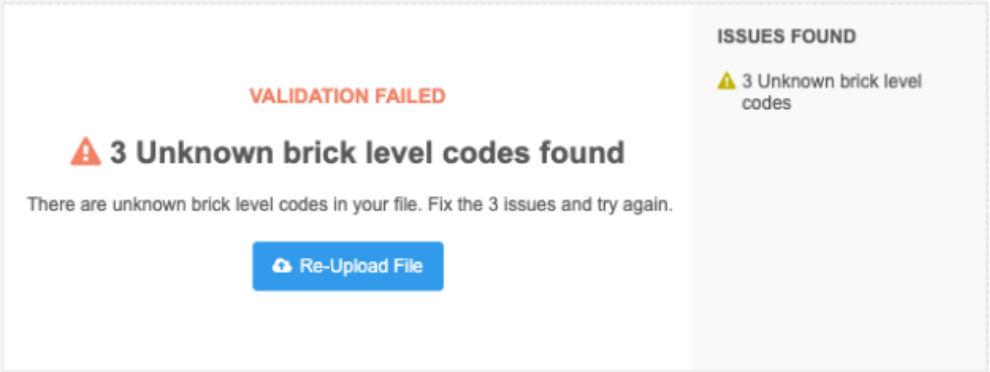



5. **Mapping File** section - Upload a .csv file of the brick mappings.

   File requirements

   - The mappings must be based on postal codes.
   - The file must strictly follow the format established in the initial version for this provider/country. For details, see the Cluster Version Help Guide.

   The file will be validated. If validation errors occur, the upload fails. Fix the issues and upload the file again.




6. When the file uploads successfully, you can save the version.

**Note:** The brick mapping file cannot be changed after the version is saved.

The new cluster version will be available for the country in the cluster management configuration (**Data Model > Cluster Management**).

If you choose the new version for the country, addresses will be updated with any changes whenever the cluster code calculation is triggered. For details, see Managing clusters data in the *Veeva Network MDM Online Help*.

### Mapping file validation issues

Mapping files are validated for the expected format and data.

| Error Message | Details |
|---|---|
| **The uploaded file includes <n> malformed rows.** | The .csv file is malformed in the following cases:<br>• Inconsistent column counts across rows.<br>• There are values with unclosed text qualifiers / unclosed quotes. |
| **The uploaded file includes <n> duplicate rows.** | All values in a row are identical with another row. |
| **The values in the uploaded file are not comma separated.** | All columns must be comma-delimited. |
| **The values in the uploaded file are not closed by a text qualifier (").** | All values must be enclosed by a text qualifier. This is especially true for the brick label since it can contain commas. |
| **The uploaded file is not encoded as "Unicode (UTF-8)".** | Ensure the file encoding is "Unicode UTF-8" - without "Byte Order Marks" (BOM). |

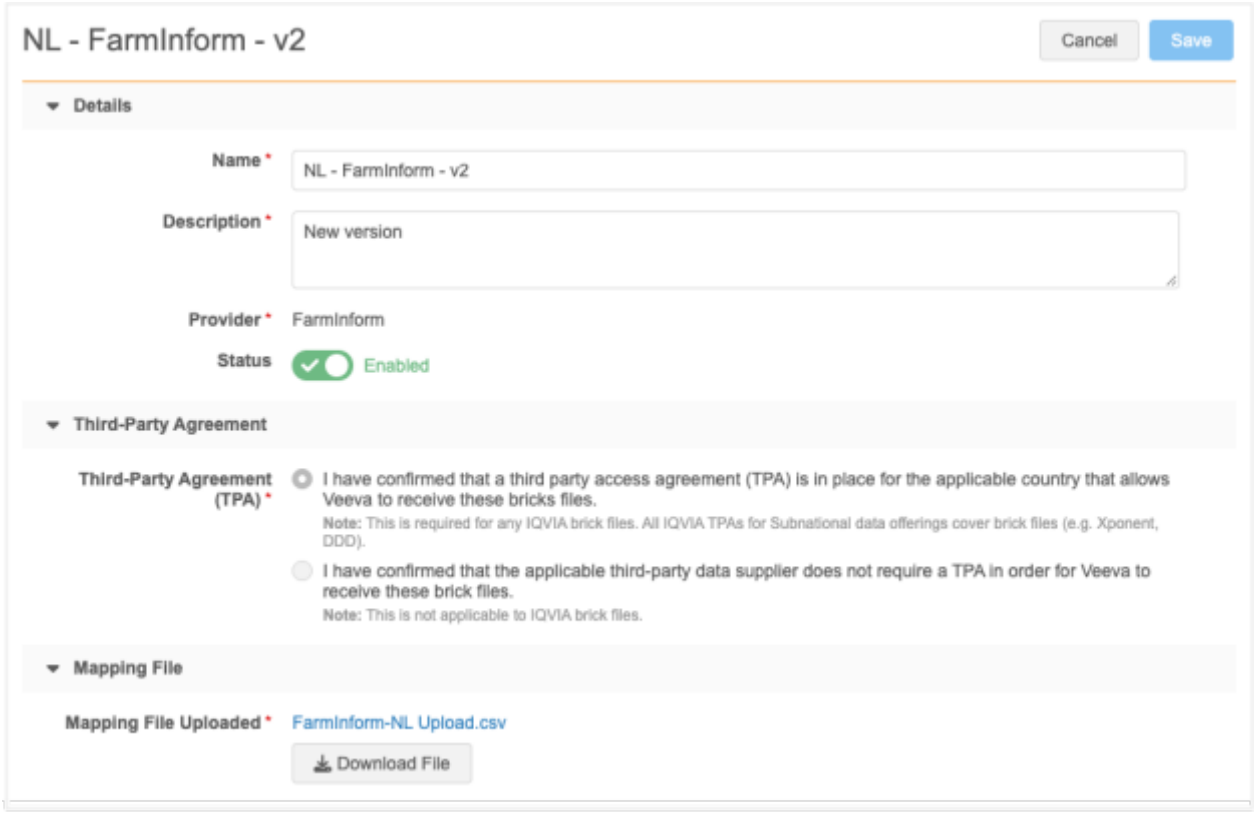
| Error Message | Details |
|---|---|
| **The uploaded file includes unknown brick levels.** | The allowed brick level codes depend on the country/provider configuration.<br>Examples of allowed codes for countries<br>• IQVIA/Greece - "MICRO-BRICK"<br>• FarmInform/Netherlands - "FIF0" and "FIF2" |

### *Edit the cluster version*

Custom cluster versions can be updated. Only the following details can be changed:

- **Name**
- **Description**
- **Status**

To make changes to a mapping file, add a new version and disable the previous version if applicable.



### *Testing cluster versions*

Test the file in your Network MDM Sandbox instance using Network Reporting.

#### Compare addresses (*Optional*)

To check the changes made by the new cluster version, use a custom table to snapshot a country's address data under the older cluster version, then compare it to addresses using the new custom cluster version.

If testing reveals issues, disable the new custom cluster version and create another one.

#### Create the custom cluster version in production

Once you're satisfied that the cluster version applies the correct updates to the country's addresses, manually add the custom version to your Production instance.

#### Version numbers

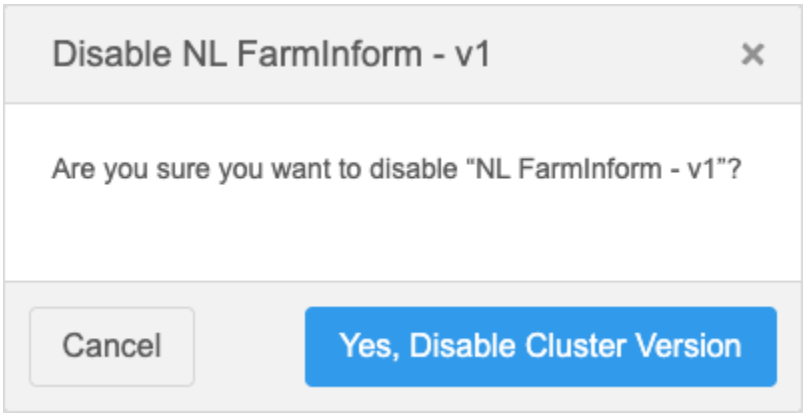
Cluster version numbers are automatically incremented each time a custom cluster version is created. If testing in Sandbox revealed issues and you disabled a version, the version numbers incremented in Sandbox and Production might not match. To avoid confusion, use a meaningful name and description to clearly identify each cluster version.

### *Disable cluster versions*

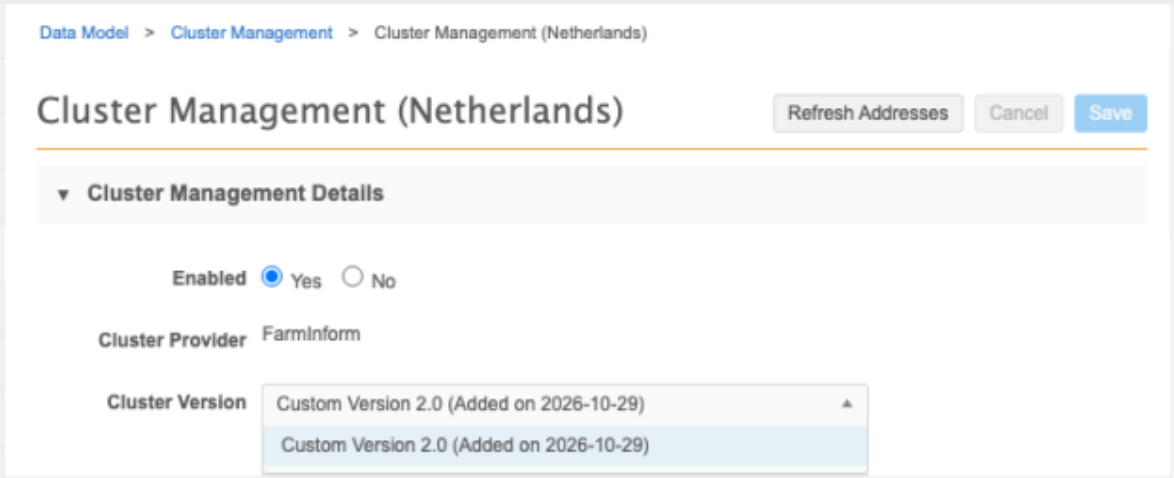
When you no longer require a version or a version contains errors and cannot be used, you can disable it in your Network MDM instance.

To disable a version:

1. On the Cluster Version list page, toggle the **Status** button to **Disabled**.
2. In the dialog, confirm your choice.



The cluster version is now disabled and cannot be selected as a version in the cluster configuration for that country.




**Note:** Veeva-managed cluster versions are read-only. They will automatically become disabled and disappear from your Network MDM instance when you create a custom cluster version for that country/provider.

### *Logs*

Updates to cluster versions are tracked in the System Audit Log.

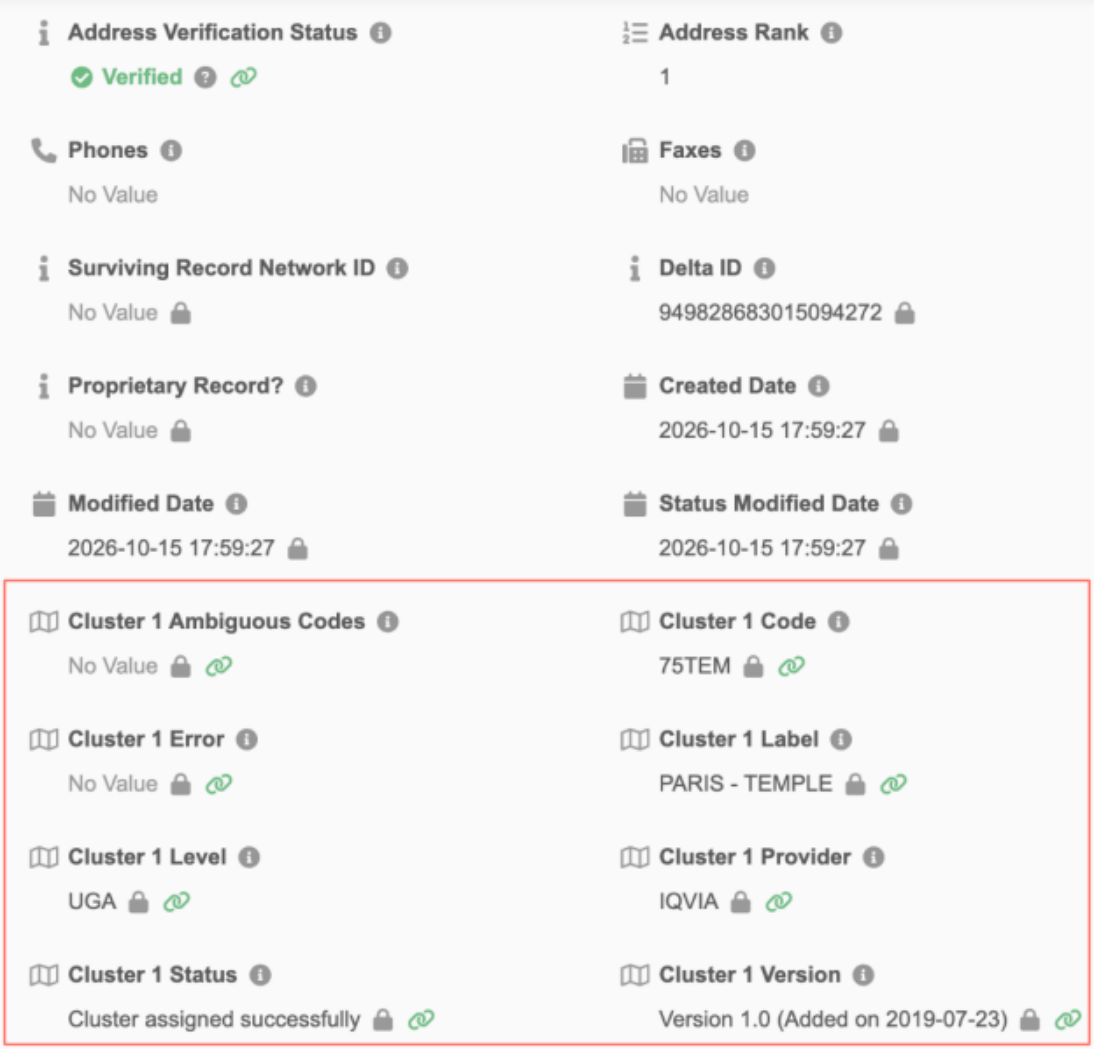
Administrators can trace the following information:

- **Cluster version details** - Country, provider, cluster version, and created date.
- **User details** - The user that created the cluster version.
- **TPA details** - The user's choice for the TPA confirmation question.

## CLUSTER CODES ON INHERITED ADDRESSES

26R3

Inherited addresses can include cluster codes. Administrators can add cluster fields to the Network Address Inheritance configuration so inherited addresses include codes.




This enhancement is available by default.

### *Prerequisites*

The following features must be enabled in your Network MDM instance:

- Network Address Inheritance
- Cluster Management - At least one country/cluster provider combination must be enabled.

To enable these features, contact Veeva Support.

### *Supported fields*

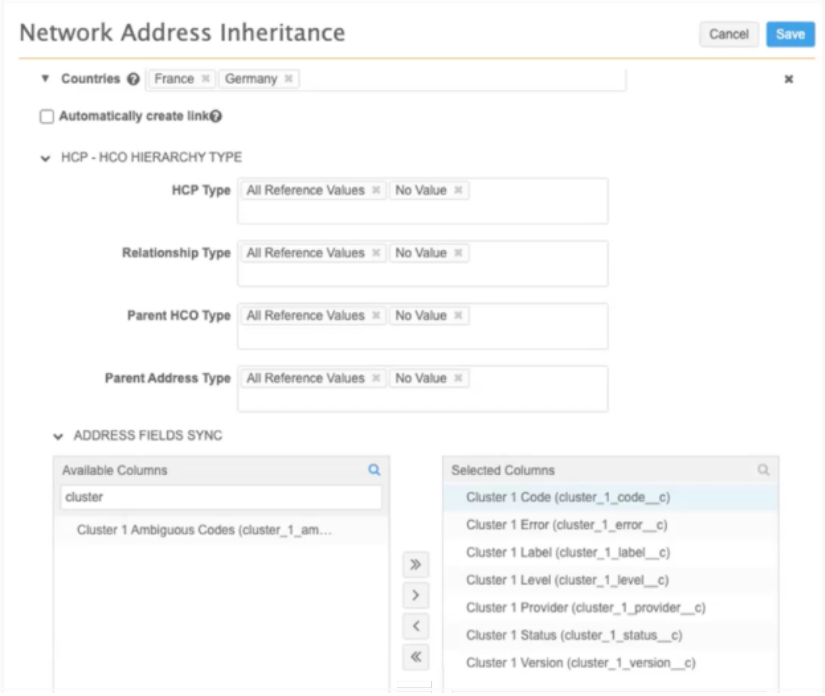
All cluster code fields can be added to your Network Address Inheritance configuration.

- cluster_1_ambiguous_codes__c
- cluster_1_code__c
- cluster_1_error__c
- cluster_1_label__c
- cluster_1_level__c
- cluster_1_provider__c
- cluster_1_status__c
- cluster_1_version__c
- cluster_2_ambiguous_codes__c
- cluster_2_code__c
- cluster_2_error__c
- cluster_2_label__c
- cluster_2_level__c
- cluster_2_provider__c
- cluster_2_status__c

### *Including the fields*

Add the cluster fields to your Network Address Inheritance country configuration.

1. In the Admin console, click **Data Model > Network Address Inheritance**.
2. In the **Country Groups** section, expand the country group.
3. In the **Address Fields Sync** section, move the cluster code fields from the **Available Columns** to the **Selected Columns** pane using the arrow icons.




4. **Save** your changes.

Now that the cluster field is configured as a Network Address Inheritance sync field, its value will be pushed to any synced addresses on child entities.

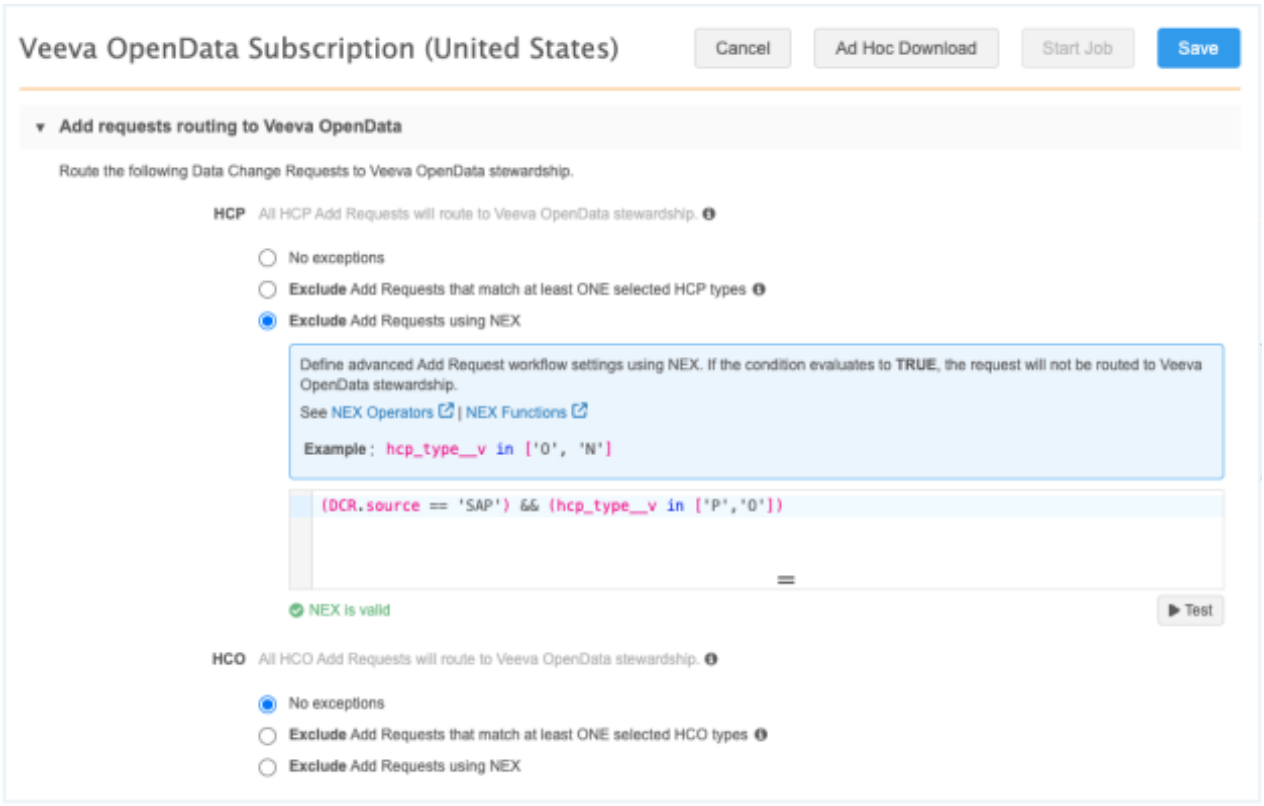
## OpenData subscriptions

### ADD REQUEST ROUTING USING NEX

26R3

Administrators can configure their OpenData country subscriptions to route add requests submitted from specific sources, systems, and users to local data stewards.

Previously, add request routing was available by HCP/HCO type only. Now, you can use Network Expression (NEX) rules to define criteria for routing add requests directly to your local data stewards.



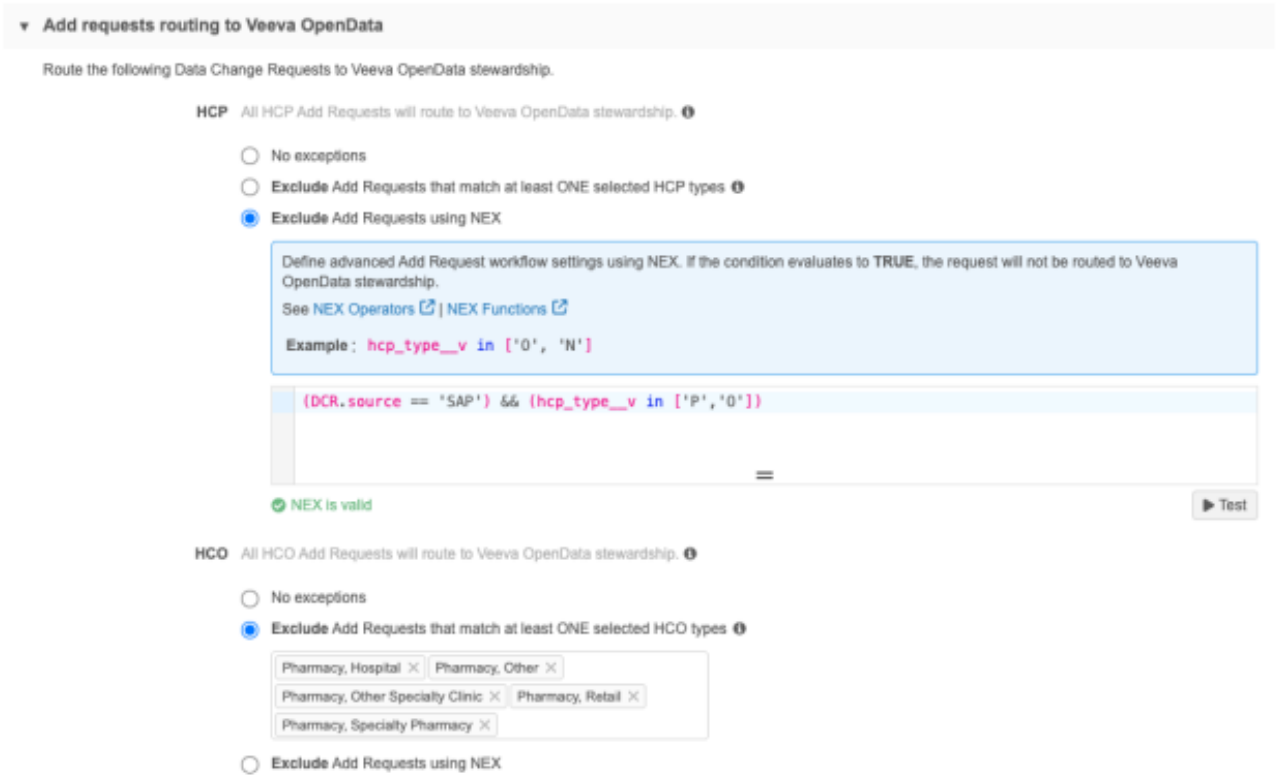

In addition to expanding support, the Add Requests Routing to Veeva OpenData feature is now enabled by default in all Network MDM instances. Previously, it was available only by request.

#### *Impact to existing customers*

There is no impact to your existing OpenData configurations. You must explicitly configure add request routing to local data stewards.

#### *Add request routing options*

To support the ability to define specific conditions, the **Add Requests Routing to Veeva OpenData** section is updated to include an option to define NEX rules.




The HCP and HCO heading contain three options:

| Option | Details |
|---|---|
| **No exceptions** | All add requests are routed to OpenData. This is the default option. |
| **Exclude Add Requests that match at least one selected HCP/HCO type** | Choose object types from the list. Add requests for those types are routed to local stewards. |
| **Exclude Add Requests using NEX** | Define NEX rules to specify the records to route to local stewards. |

### *Define NEX rules*

Use the NEX rules option to define specific criteria for routing add requests.

**Supported metadata**

The following DCR fields can be used to in the NEX rule:

- creator
- source
- system

**Example 1: Define specific users**

```
DCR.creator == 'bob.smith@verteo.veevanetwork.com'
```

**Example 2: Define specific sources**

```
DCR.source == 'SAP'
```

**Example 3: Define specific systems**

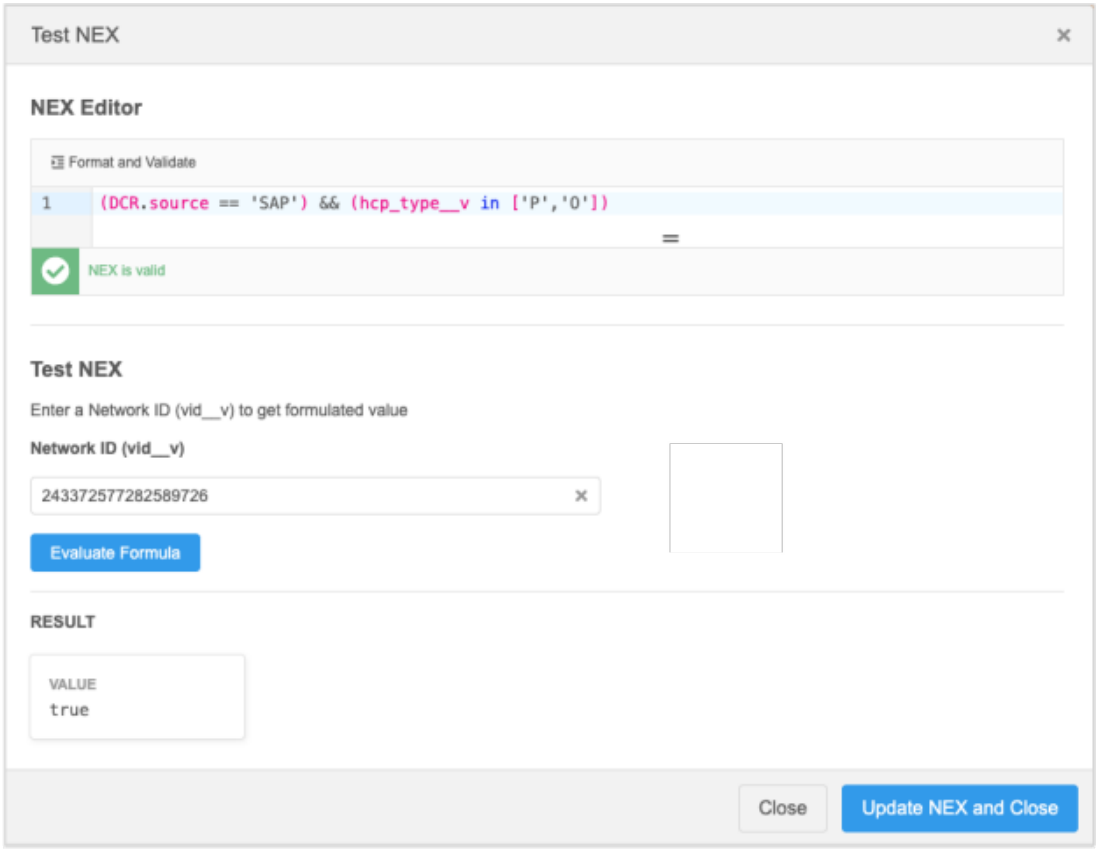
```
DCR.system== 'SAP_verteo'
```

**Example 4: Define specific source and HCP type**

```
(DCR.source == 'SAP') && (hcp_type__v in ['P','O'])
```

### *Test NEX rules*

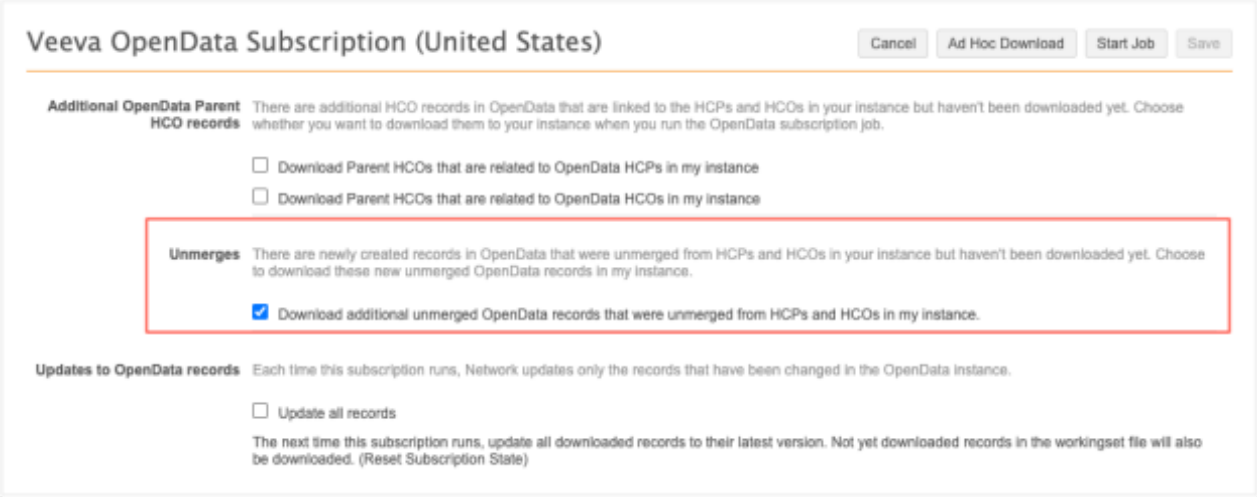
Test the NEX syntax to ensure that its valid and that it returns the desired result.



## DOWNLOAD UNMERGED OPENDATA RECORDS

26R2.1

Administrators can now configure OpenData subscriptions to automatically download records that OpenData has unmerged. These are newly created records that were unmerged from HCPs and HCOs in your instance. Previously, unmerged records could be downloaded only using ad hoc download jobs.




This enhancement is available by default in your Network MDM instance. Administrators can choose to enable it in their OpenData country subscription.

### *Automatically download unmerged records*

OpenData subscription configurations contain a new option to download unmerged records. The **Download additional unmerged OpenData records that were unmerged from HCPs and HCOs in my instance** option is not enabled by default.

The newly created unmerged records are downloaded when the OpenData country subscription runs if the following conditions are met:

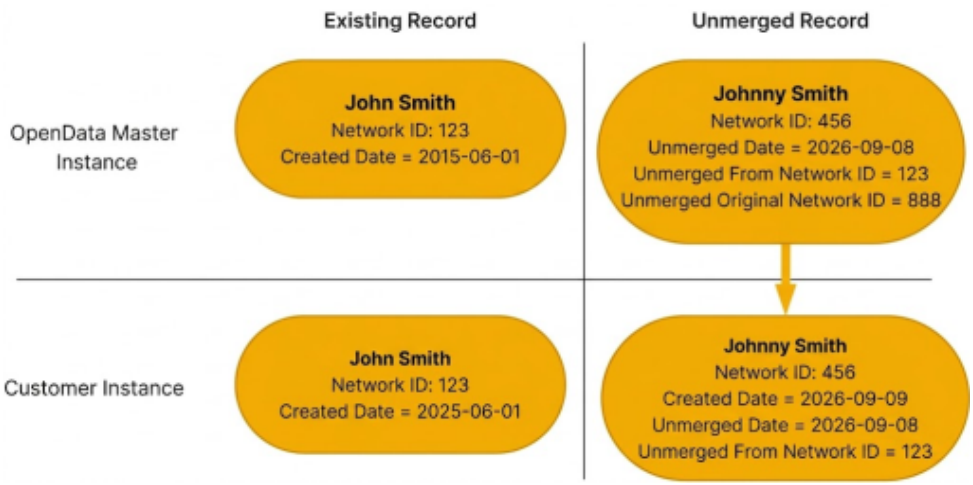
- The option to download unmerged records is enabled
- One of the original merged records is in your Network instance
- One of the original merged records is not unsubscribed in your instance.

**Example**

In this example, the OpenData record, John Smith, is downloaded in your Network MDM instance.

OpenData unmerges the record. The Johnny Smith record is created.

If the option to download unmerged records is enabled, the Johnny Smith record will be downloaded the next time the OpenData subscription run. John Smith is already in your instance and it is not unsubscribed.

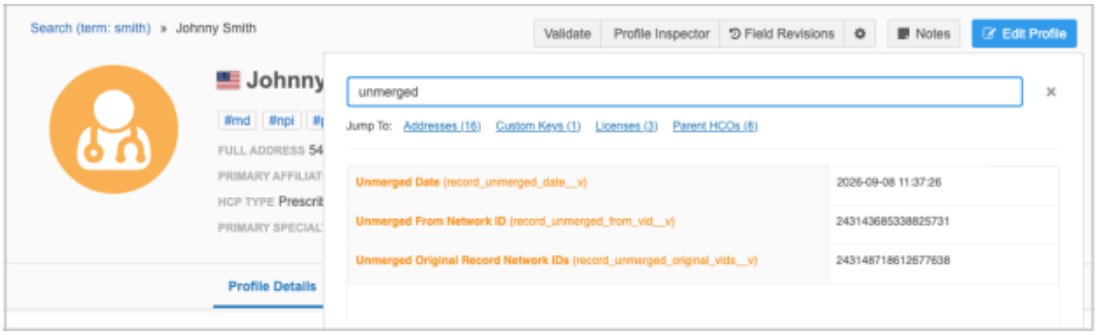



**Unmerged fields**

When an unmerged record is added to your instance, it contains the three fields that provide details about the unmerge.

- **Unmerged Date** (`record_unmerged_date__v`) - Date when the record was unmerged.
- **Unmerged from Network ID** (`record_unmerged_from_vid__v`) - Network ID of record that this record was unmerged from.
- **Original Record Network IDs** ( `record_unmerged_original_vids__v`) - The Network IDs of the records that existed before they were merged. It confirms which original record's data is now being restored into the new record.

**Tip:** To quickly find the fields on the record, open the **Profile Inspector** and search for "unmerged".

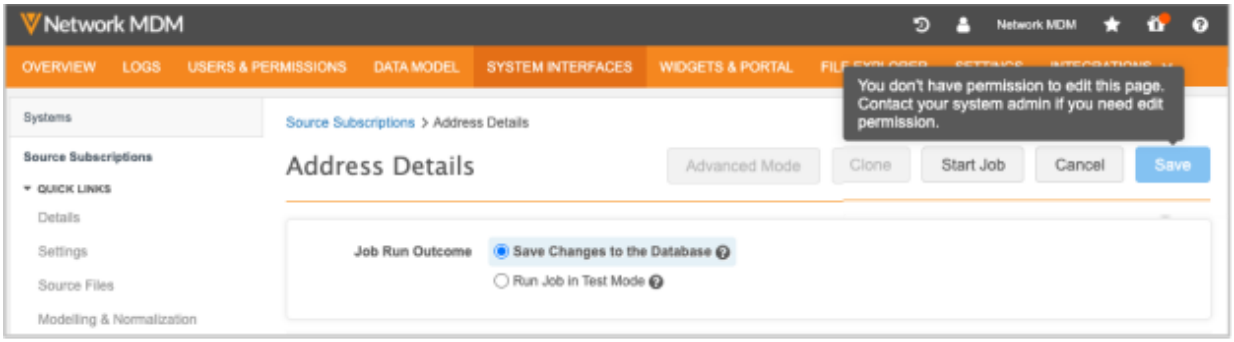


## Users

### RESTRICT ADMIN PERMISSIONS

26R2.1

Administrators can now use permission sets to control access to administrative functions. This can be especially useful for Data Manager users that have access to features in the Admin console but should not make configuration changes. Administrators can provide access to run subscriptions and view the configuration but restrict edit access to the features.




This enhancement is enabled by default.

#### *Supported users*

Admin permissions apply to user types that have access to the features in the Admin console:

- Data Manager
- System Administrator
- System and Data Admin

#### *Impact to existing users*

There is no impact to existing users. Data Managers, System Administrators, and System and Data Admins continue to have read and write access to the features.

Administrative users must explicitly use permission sets to provide or restrict access to admin features.

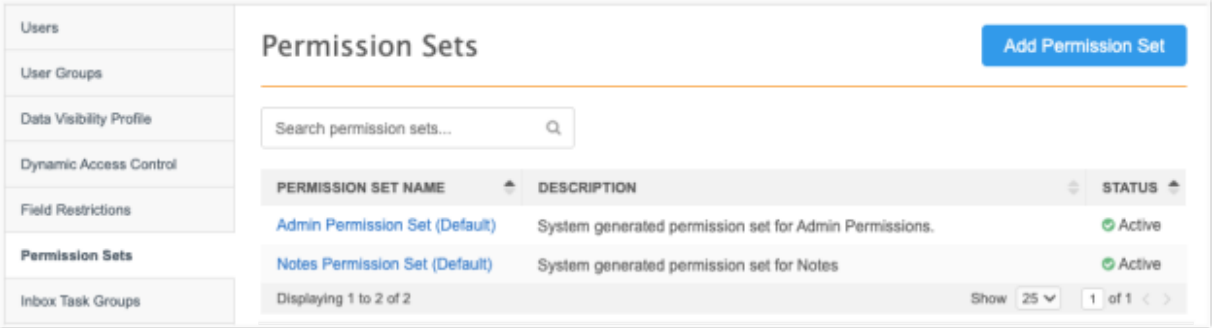
### *Supported features and functions*

By default, users have add and edit access to these features. Restricting a feature reduces access to read-only mode and running subscriptions.

| Feature | Add & Edit Functions | Read-Only (Add & Edit Disabled) |
|---|---|---|
| **Data model** | | |
| **Data domains** | Add domain<br>Add object<br>Export Data Model<br>Save objects<br>Add fields<br>Enable / disable fields<br>Save fields | View |
| **Reference Data** | Add reference type<br>Edit reference type summary<br>Import reference codes. | View<br>Export |
| **System Interfaces** | | |
| **Systems** | Add system<br>Save system | View |
| **Source subscription** | Add subscription<br>Clone subscription<br>Save subscription<br>Access Advanced Mode | View<br>Start Job |
| **Target subscription** | Add subscription<br>Clone subscription<br>Save subscription<br>Export by Network ID | View<br>Start Job |
| **Veeva OpenData subscriptions** | Create New Country Group<br>Save subscription | View<br>Start Job<br>Ad Hoc Download |
| **Match Configurations**<br>(Ad Hoc Match Configuration, Match Default Configuration, Add Request Match Configuration) | Save configuration | View |
| **Match Rule Collections** | Add Collection<br>Save collection | View |
| **Source Rankings** | Save | View |
| **Transformation Rules** | New Rule<br>Save rule<br>Clone<br>Delete | View |

### *Admin Permission Set*

A new permission set called `Admin Permission Set` is added to your Network MDM instance.

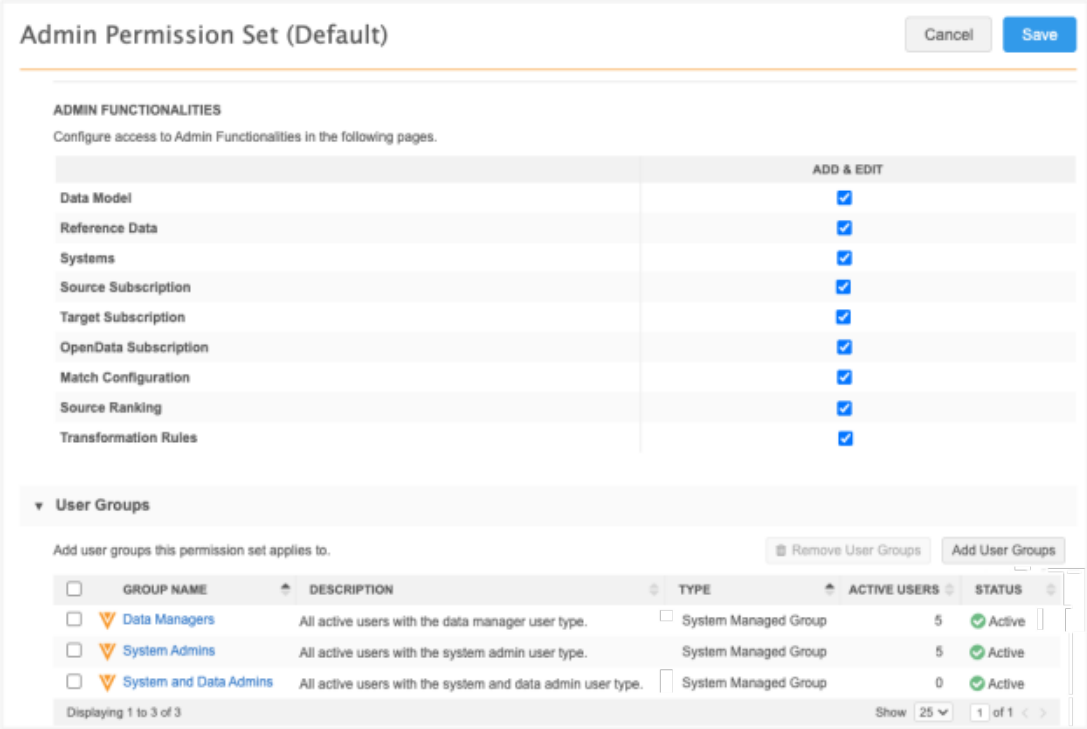



It includes the following system-managed user groups:

- Data Managers
- System Admins
- System and Data Admins

These groups contain all users of that type that are defined in your Network MDM instance.

All features in the **Admin Functionalities** section have **Add & Edit** permissions by default. This ensures that there is no impact to existing users.



### Example scenarios

- To restrict these Admin features for Data Managers, remove the Data Managers user group from the Admin Permission Set.
- To restrict Admin features on a more granular level (for example, by user), create a new permission set and assign access by user.

If users are included in multiple permission sets, the highest permission level wins.

## *Logs*

Changes to the permission sets are tracked in the System Audit Log.

## Admin settings

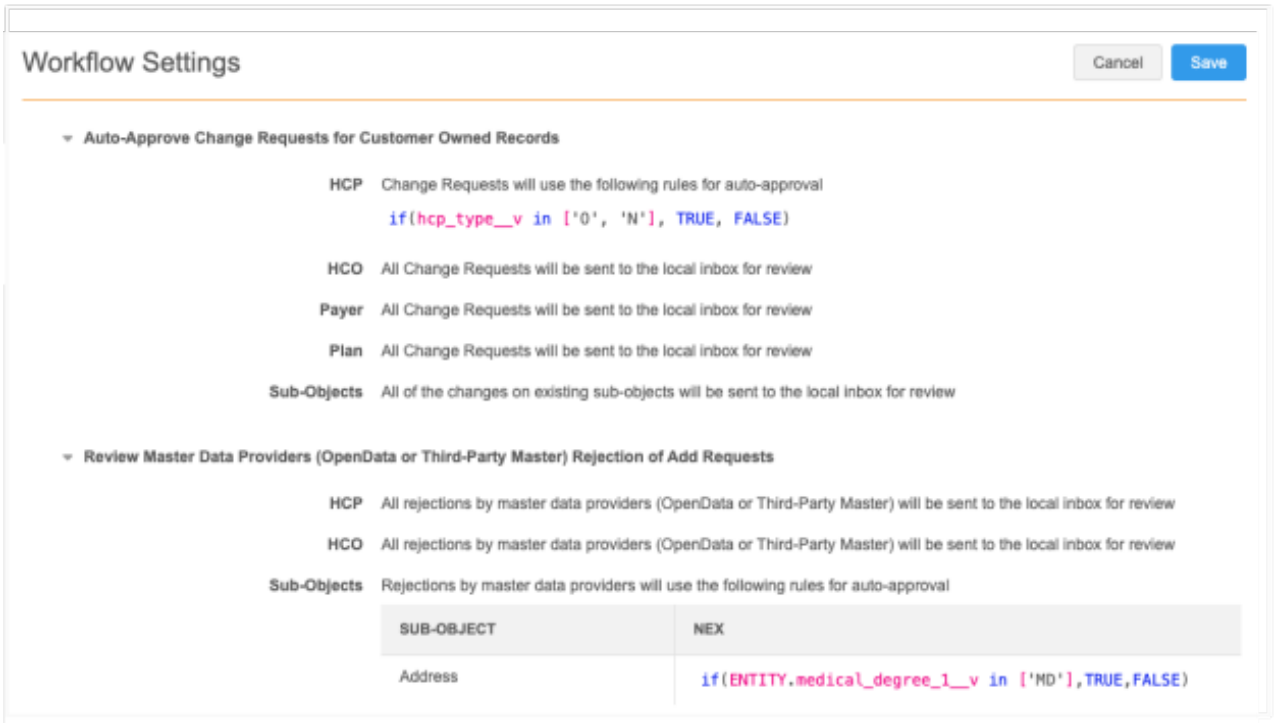
### USE NEX RULES FOR WORKFLOW SETTINGS

26R2.1

Administrators now have more flexibility for configuring auto-approvals and review rejections in the workflow settings. Network Expression (NEX) Rules can be used to identify specific conditions.

**Examples**

- Review rejections on addresses based on the HCP or HCO value.
- Auto-approve specific sub-objects on HCPs, but not HCOs.
- Auto-approve add requests submitted by specific users.
- Auto-approve add requests for HCPs based on the HCP type.




This enhancement is enabled by default. Administrators can define NEX rules for the supported settings.

#### *Supported workflow settings*

- Auto-Approve Add Requests for New Customer Owned Records
- Auto-Approve Change Requests for New Customer Owned Records
- Review Master Data Providers (OpenData or Third-Party Master) Rejection of Add Requests

### *NEX Rule enhancements for workflow settings*

To support the ability to define specific conditions for these settings, the following updates are made to Network expressions.

#### Workflow metadata

The following three fields can be used to in Network expressions:

- creator
- system
- source

**Example: Auto-approve Add Requests for HCPs**

```
if(DCR.creator == 'bob.smith@verteo.veevanetwork.com', TRUE, FALSE)
```

#### Use entity level fields in sub-object rules

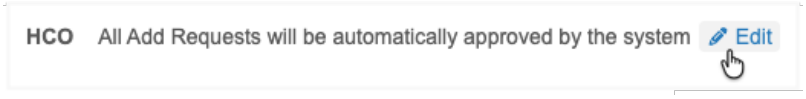
Create a condition for a sub-object based on a field value for the related entity.

**Example - Review rejections for addresses if the HCP is an MD**

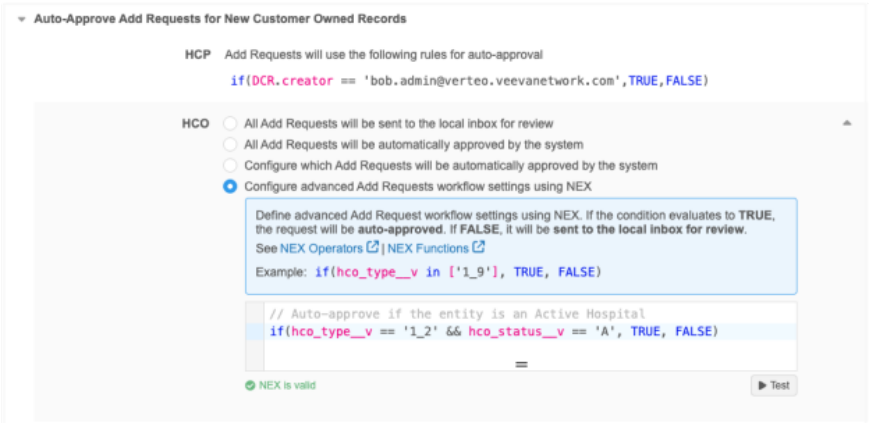
```
ENTITY.medical_degree_1__v in ['MD']
```

### *Define NEX rules*

1. In the Admin console, click **Settings > Workflow Settings**.
2. Hover over the setting that you want to change to display the **Edit** button.




3. Click **Edit** to display the available options for the setting. Select the option to use NEX.



4. Enter the Network Expression in the field.

   **Tip:** Comments can be added to explain the expression or add details for other users.

5. The NEX rule validates as you type the expression.
6. **Save** your changes.

The workflow setting is now to use the NEX rule for that object.

## EXPORTING CONFIGURATIONS

26R2.1

Single sign-on (SSO) configurations are no longer supported in configuration packages because they contain environment-specific details that cannot be transferred between instances. SSO settings must be configured within each instance.

This change is enabled by default in your Network MDM instance.

### *New configuration packages*

SSO settings cannot be added to export packages.

### *Existing configuration packages*

If your package included SSO settings, the configuration package will fail when you try to import it to a target instance.

To continue using the package, clone it and remove the SSO settings.

## Integrations

### Salesforce External Client App Credential

26R3

A new credential type, Salesforce External Client App, connects to Salesforce using an OAuth 2.0 authorization flow instead of a Salesforce username and password.

This enhancement is available by default in your Network MDM instance. Administrators can create a Salesforce External Client App credential as needed.

#### *Why this is needed*

Salesforce is retiring the SOAP-based authentication (username/password) in their Summer '27 release (May 2027).

#### *Action required*

Some Network MDM's integrations with Salesforce use the Salesforce Org credential.

- Salesforce (not on Veeva CRM)
- Veeva Connector (Extract and Upsert) for Salesforce
- Salesforce data components

If you use these features, replace your existing Salesforce Org credential with the Salesforce External Client app credential. This will ensure that the integrations remain functional when Salesforce retires the SOAP authentication.

**Important**: Network Bridge integrations with Veeva CRM that use the Salesforce org ID will be automatically migrated - no action is required.

#### *Benefits*

- **No more password dependency** - Removes reliance on Salesforce username/password login, which Salesforce is retiring in Summer 2027.
- **Credentials stay with Salesforce** - Network MDM never sees your Salesforce credentials; the Salesforce admin authenticates and authorizes the connection directly with Salesforce.
- **Resolves password-only connections** - Supports Salesforce orgs that are not on Veeva CRM (for example, Service Cloud) and features that currently authenticate with username/password.

### *Process overview*

To create the credential the following task are required in your Network MDM instance and your Salesforce org.

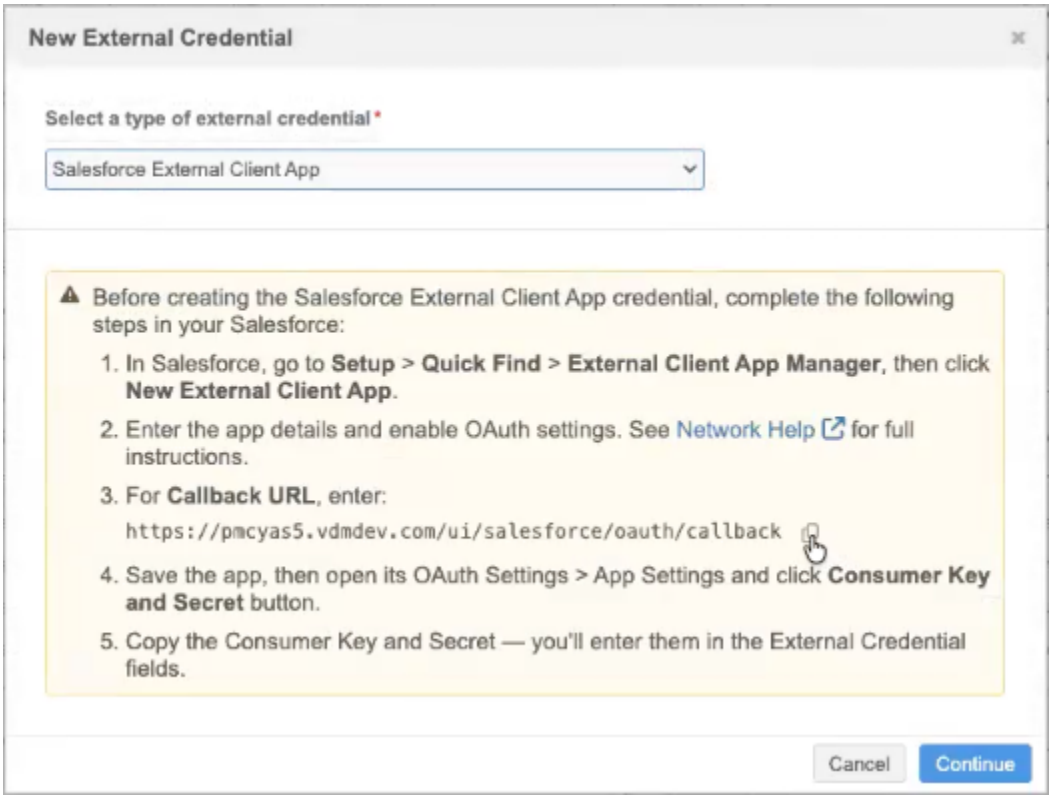
- **Network MDM** - Send the Callback URL to the Salesforce admin.
- **Salesforce** - Add an External Client App and create the Consumer Key and Secret.
- **Network MDM** - Create the Salesforce External Client App credential using the Consumer Key and Consumer Secret and then generate the activation link.
- **Salesforce** - Use the activation link to authorize Network MDM to connect to your Salesforce org.

### *Retrieve the Callback URL*

Network MDM admins must provide the Callback URL to the Salesforce admin for the External Client App configuration.

This is the address the Salesforce user will be sent back to after they approve the OAuth connection.

1. In the Admin console, click **Settings > External Credentials** and choose **Salesforce External Client App**.
2. On the dialog, click the **Copy** icon beside **Callback URL**.
3. Send the URL with the Salesforce admin.



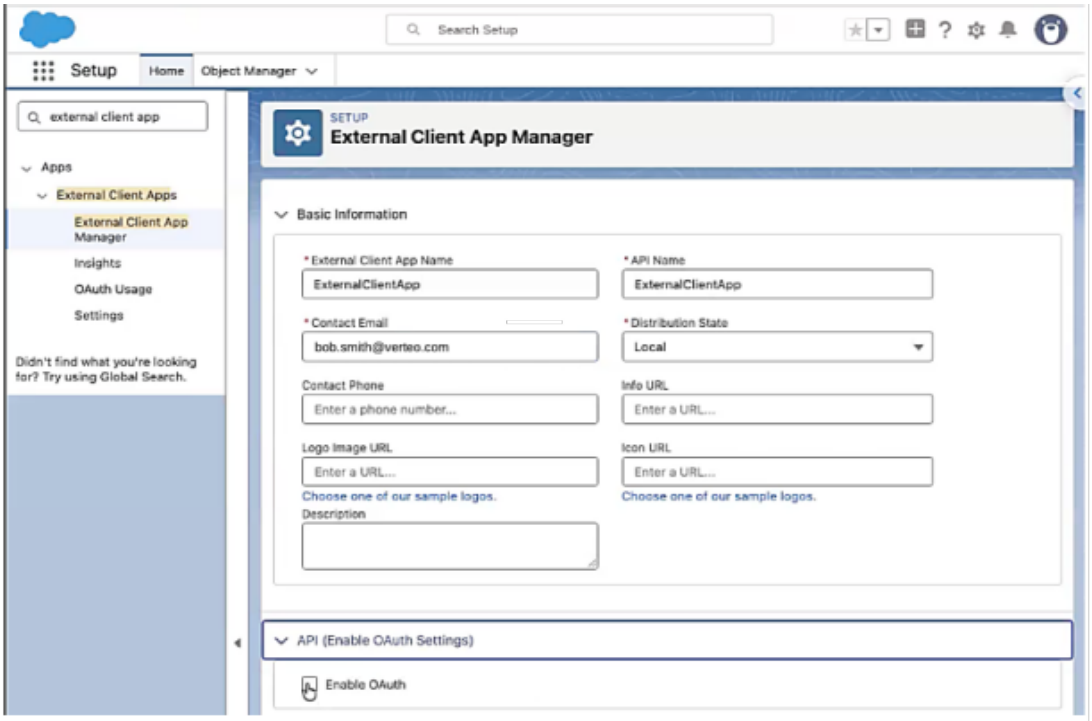
### *Salesforce configuration*

Before creating the credential in Network MDM, the Salesforce admin must complete the following tasks:

- Create the External Client App.
- Generate a key and secret.

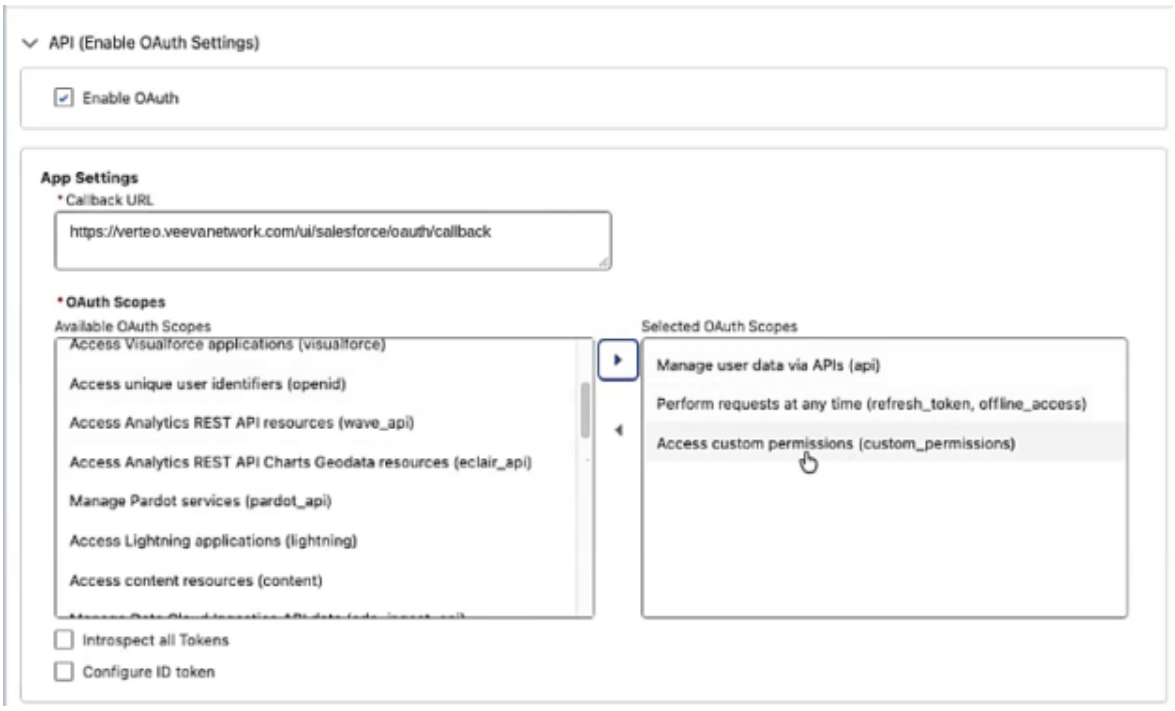
Follow these steps in your Salesforce org:

1. Go to **Setup > Quick Find > External Client App Manager**, then click **New External Client App**.
2. In the **Basic Information** section, add the required details.




3. Expand **API (Enable OAuth Settings)** and click **Enable OAuth**.
4. **App Settings** - Add the **Callback URL**.

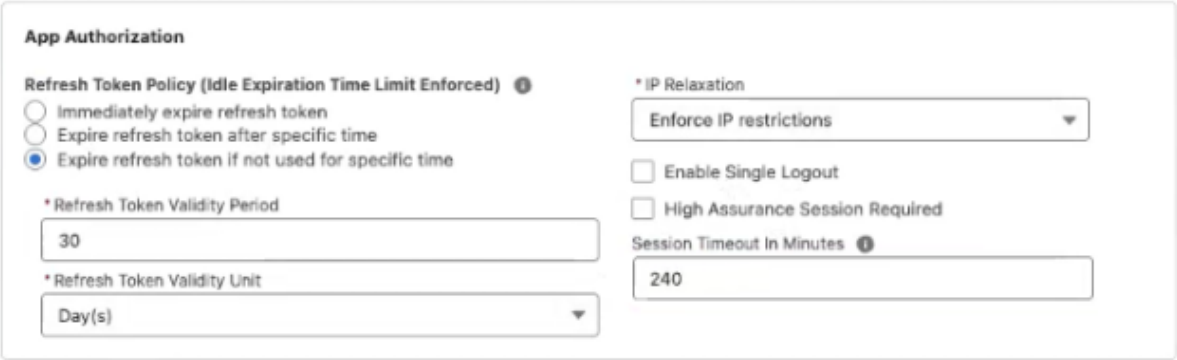
   Use the URL provided by the Network MDM admin.



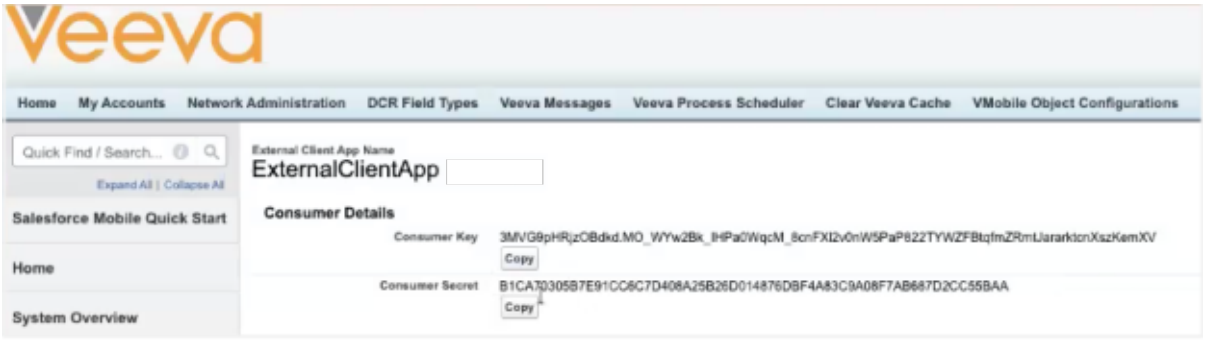

5. **OAuth Scopes** - Move the following permissions from the **Available OAuth Scopes** pane to the **Selected OAuth Scopes** pane.
    - Manage user data via APIs (api)
    - Perform requests at any time (refresh_taken, offline_access)
    - Access custom permissions (custom_permissions)
6. Click **Create** to add the External Client App.
7. In the new app, on the **Policies** tab, click **Edit**.
8. Expand **OAuth Policies** and define the **App Authorization** settings.

| Setting | Value |
|---|---|
| **Refresh Token Policy** | Expire refresh token if not used for specific time |
| **Refresh Token Validity Period** | 30 |
| **Refresh Token Validity Unit** | Day(s) |
| **IP Relaxation** | Enforce IP restrictions |
| **Session Timeout in Minutes** | 240 |

**Example**




9. **Save** your changes.
10. On the **Settings** tab, expand **OAuth Settings**. In the **App Settings** section, click **Consumer Key and Secret**.
11. Login again with your username and password. You will be redirected to the External Client App.
12. In the **Consumer Details** section, copy the **Consumer Key** and **Consumer Secret**. You need these to create the External Credential in Network MDM.

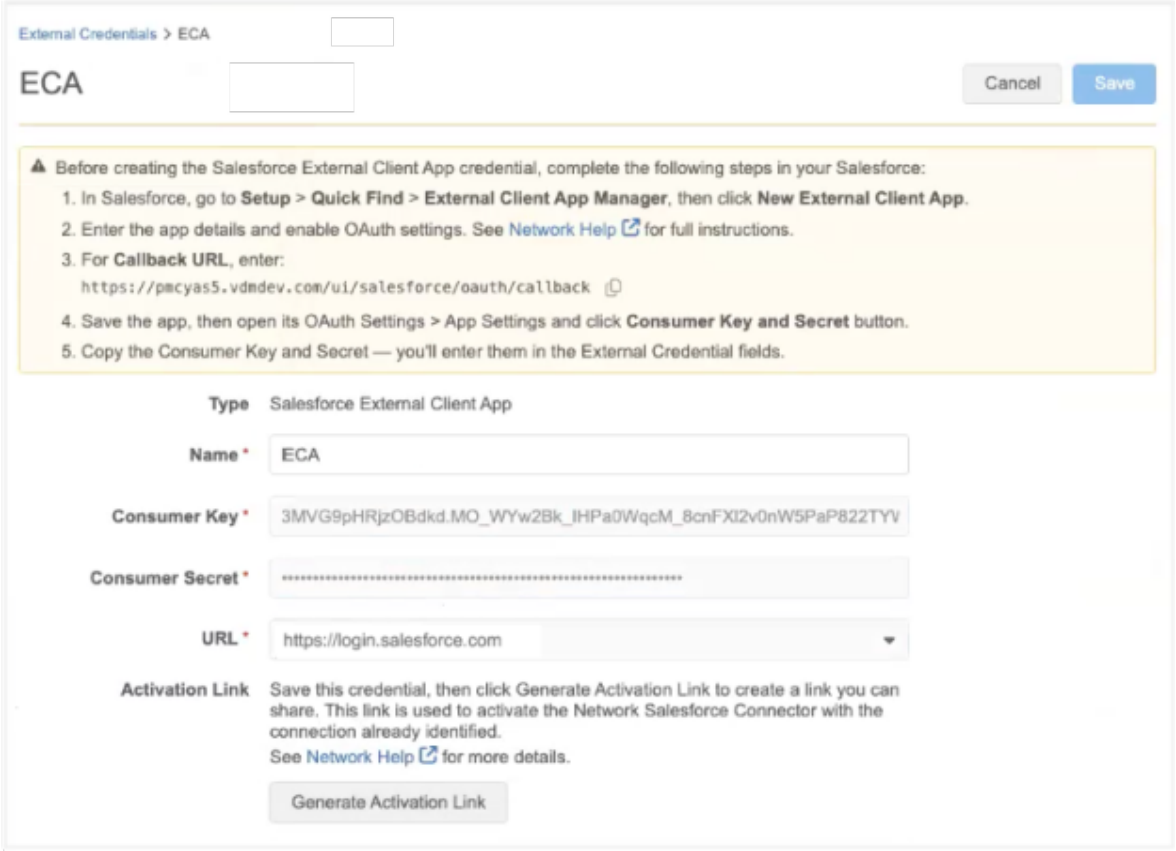



Share the Consumer Key and Consumer Secret with the Network MDM admin to store in the external credential.

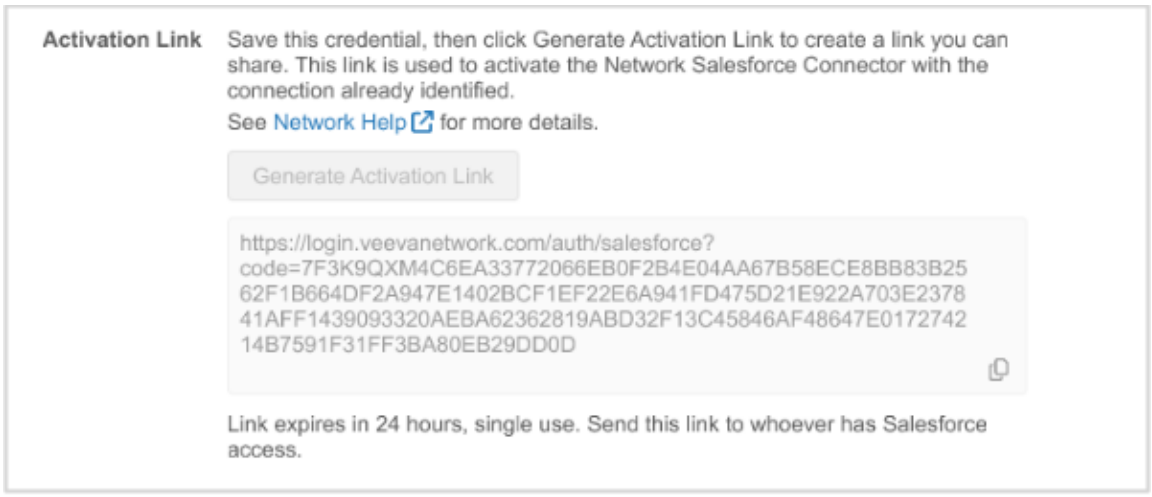
### *Create the Salesforce External Client App credential*

Use the Consumer Key and Secret to create the credential in your Network MDM instance.

1. In the Admin console, click **Settings > External Credentials**.
2. Click **Add Credential** and choose **Salesforce External Client App**.




3. Define the following settings:
    - **Name** - A meaningful name to identify the credential.
    - **Consumer Key** and **Consumer Secret** - Add the values provided by the Salesforce admin.
    - **URL** - Choose the URL to your Salesforce org.
4. Save the credential.
5. Click **Generate Activation Link**. There might be a short delay waiting for the button to become active.




6. Copy the link and send it to the Salesforce admin.

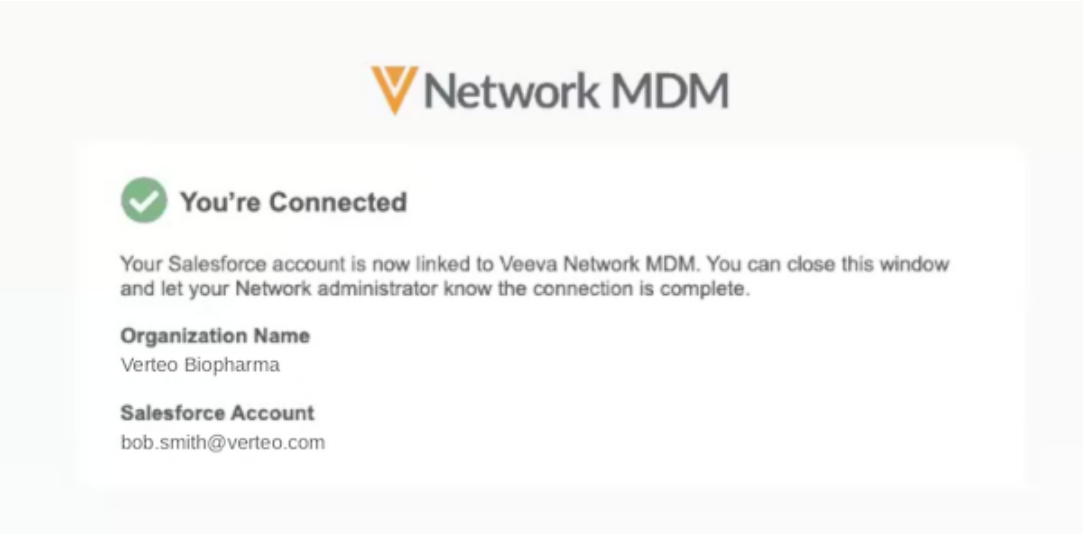
For security, the activation link is valid for 24 hours.

### *Activate the Network Salesforce Connector*

The Salesforce admin can now activate their connection to the Network MDM instance using the link from the new Salesforce External Client App credential.

1. Open the link in a browser. If they are not already logged in, the Salesforce login page displays.
2. Log in and when prompted, click **Allow** to authorize the connection.
3. The Salesforce admin is redirected to a Network MDM page that confirms the successful connection between their Salesforce account and the Network MDM instance.

   Their Salesforce org and user account displays.




   Advise the Network MDM admin that the connection is complete.

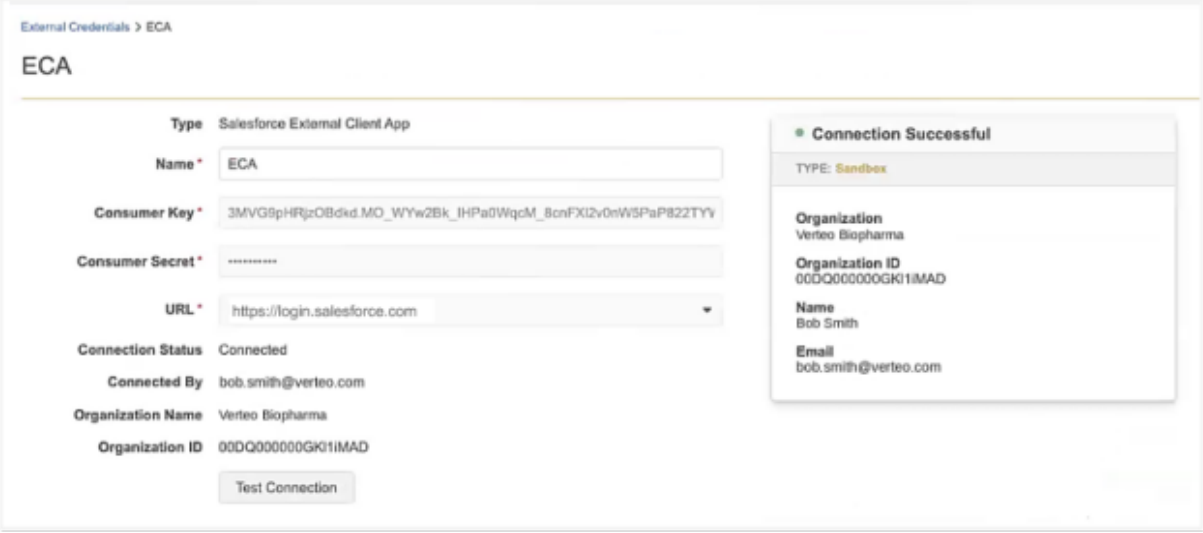
### *Verify and test the connection*

After the Salesforce admin has approved the connection, the Network Admin can verify that the correct account is connected.

1. Open or refresh the Sales External Client App credential.

   You can see that the **Generate Activation Link** button is removed and the following details display:

   - Connection Status
   - Connected By
   - Org Name
   - Org ID
2. Click **Test Connection** to verify the connection is still valid.




The supported integrations (Salesforce Veeva Connectors and data components) can now be updated to use the Salesforce External Client App credential.

**Important**: These steps must be done for each of your Network MDM instances; Production and Sandbox. After a Sandbox is refreshed, the steps must be completed again to connect to your Salesforce org.

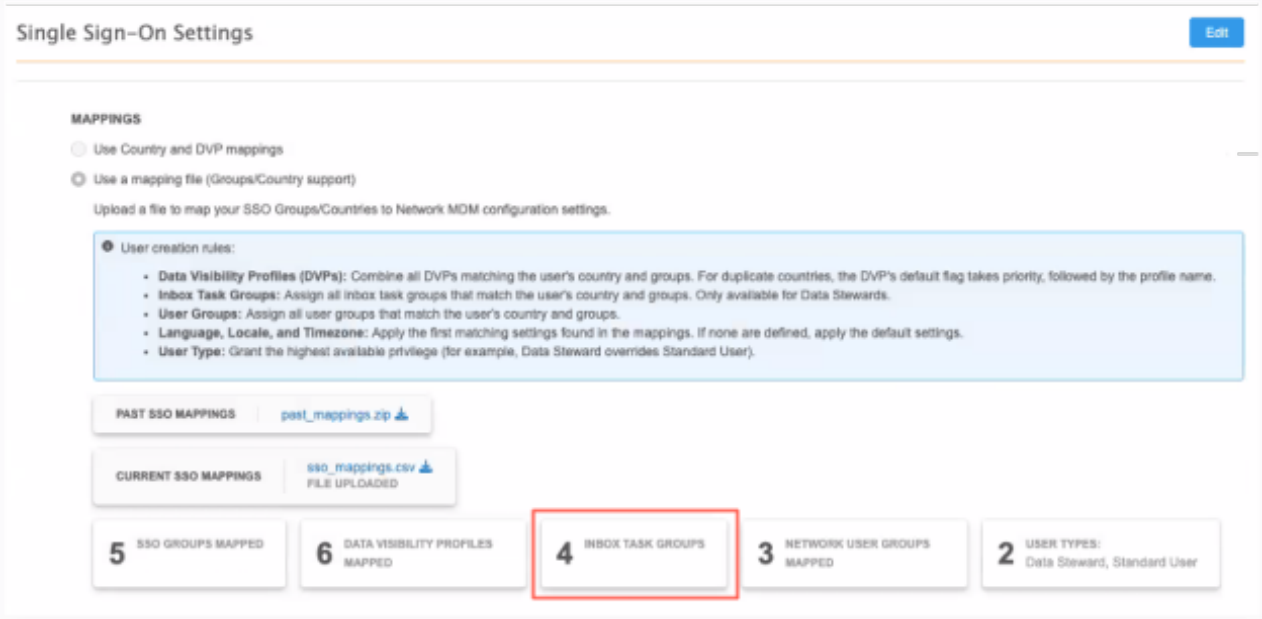
## Security

### SINGLE SIGN-ON MAPPINGS

26R2.1

In version 26R2.0, single sign-on was enhanced to enable Administrators to use a mapping file to dynamically provision new users. This release expands those mappings to include Inbox Task Groups for Data Steward users.

Administrators no longer need to manually assign inbox task groups to each new data steward user. When data stewards log in for the first time, they can immediately access tasks assigned to the inbox task group.




This enhancement is enabled by default.

#### *Supported user types*

- Data Stewards

Inbox task groups cannot be assigned to Standard Users or Portal Users.

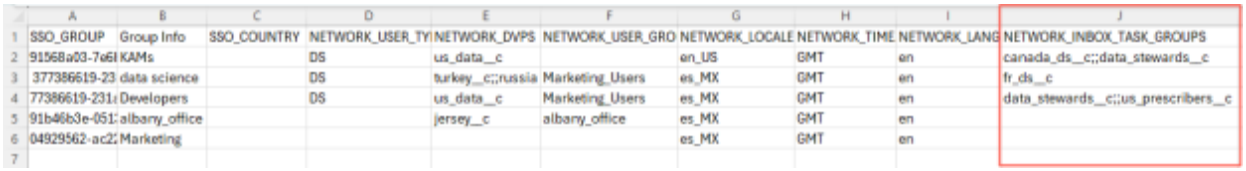
#### *Mappings file*

The `sso_mapping.csv` file is updated to include a column for Inbox Task Groups.

When the user type is Data Steward, add the required Inbox Task Groups using the inbox task group ID found in the `network_configurations.xlsx` file that is downloaded with the `sso_mappings.csv` file.

Multiple inbox task groups can be added as comma separated values.

**Example**



| | A | B | C | D | E | F | G | H | I | J |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | SSO_GROUP | Group Info | SSO_COUNTRY | NETWORK_USER_TY | NETWORK_DVPS | NETWORK_USER_GRO | NETWORK_LOCALE | NETWORK_TIME | NETWORK_LANG | NETWORK_INBOX_TASK_GROUPS |
| 2 | 91568a03-7e6 | KAMs | | DS | us_data__c | | en_US | GMT | en | canada_ds__c;;data_stewards__c |
| 3 | 377386619-23 | data science | | DS | turkey__c;;russia | Marketing_Users | es_MX | GMT | en | fr_ds__c |
| 4 | 77386619-231 | Developers | | DS | us_data__c | Marketing_Users | es_MX | GMT | en | data_stewards__c;;us_prescribers__c |
| 5 | 91b46b3e-051 | albany_office | | | jersey__c | albany_office | es_MX | GMT | en | |
| 6 | 04929562-ac2 | Marketing | | | | | es_MX | GMT | en | |
| 7 | | | | | | | | | | |

**Important**: The user must have access to data for the Inbox Task Group country. Ensure that the data visibility profile (DVP) for that country is also assigned to the user type in the NETWORK_DVPS column.

### *Validating the mapping file*

When you upload the file, the Inbox Task Group configurations are validated. Errors will occur for the following issues:

- Inbox task groups are assigned to Standard users or Portal users. Those user types do not have access to the Network MDM inbox.
- An unknown inbox task group was included.
- The Data Loading inbox task group was included. This inbox task group applies to Administrator and Data Manager users only. It cannot be assigned to Data Steward users.

### *Creating the user*

When the file is successfully uploaded and the SSO configuration is saved, users logging in as Data stewards will be automatically created and assigned to the Inbox Task Group.

When they access your Network MDM instance for the first time, the Inbox page displays and includes the tasks for their assigned Inbox Task Group.

### UPDATES TO TRANSPORT SECURITY LAYER CIPHERS

26R2.1

To ensure the highest security standards, the following TLS cipher will be removed from publicly accessible Network FTP servers.

- TLS_DHE_RSA_WITH_AES_256_CCM_8

While Network MDM already enforces TLS 1.2, retiring these ciphers eliminates known vulnerabilities and strengthens your data protection.

This change will be made by default.

#### *Impact to existing customers*

No disruption is expected. Standard FTP clients will automatically negotiate stronger, supported ciphers with no action required.

If you connect using older FTP clients or custom automation scripts, you might need to update your software to maintain connectivity.

## API

### VERSION UPDATE

26R3

The Network API is updated to v41.0.

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 v40.0 until there is a change for v41.0 that they want to apply.

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