Veeva Network 19R2.0.1 Release Notes

August 2019

Contents

About these Release Notes

These Release Notes describe all features that are included in Veeva Network 19R2.0.1.

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

Browser requirements

The following are the minimum browser requirements:

- Internet Explorer™ 11+
- Google Chrome™ (most stable version at Network release)
- Safari® 10+
- Microsoft Edge™

Veeva Network is not supported on mobile devices.

Release Note updates

No features or enhancements have been added to the Release Notes since the Early version was published.

All material in the Release Notes should be reviewed to ensure that updates to existing topics are noted.

What's new

The following key enhancements comprise the Veeva Network 19R2.0 major release.

			ST	DS	DM	AD
General updates						
Terminology updates	The term *sub-object* replaces *child object* in the Network UI and documentation.	19R2.0	●	●	●	●

		ST	DS	DM	AD
Widgets					
General availability	Network widgets are now available to configure in your Network instance, by default.	19R2.0	● ●	●	●
Search widget	The Search widget resets when it is opened in a pop-up window.	19R1.1	● ●	●	●
Profile					
Classic profile view	The Classic profile view is now deprecated.	19R2.0	● ●	●	●
Sub-object and relationship object enhancements	The profile sections for these object types are updated to provide primary type information on summary cards and to sort the list section so primary objects are listed first.	19R2.0	● ●	●	●
Preview box enhancements	Some preview boxes are renamed and updated to provide more immediate information for users.	19R2.0	● ●	●	●
Multi-country HCPs	The Profile page contains a link that identifies multi-country HCPs that are managed by Veeva OpenData.	19R1.1	● ●	●	●
Ad hoc match					
Permissions	Users must have access to create ad hoc match jobs through each of their assigned data visibility profiles.	19R2.0	● ●	●	●
Usability updates	The Matched Files and Match New File pages are updated to improve the matching experience.	19R2.0	● ●	●	●
Exported sub-objects	Updated rules determine the sub-objects that are included in the exported results.	19R1.1	● ●	●	●
Usability updates	The match log and the timestamp of your jobs are updated.	19R1.1	● ●	●	●
Logs	Ad hoc match actions are now logged in the System Audit History.	19R1.1				●

			ST	DS	DM	AD
Custom objects						
Network Explorer	Custom object hierarchies can now be viewed in Network Explorer.	19R2.0	●	●	●	●
Data change requests	Network now supports add and change requests for custom objects.	19R1.1	●	●	●	●
Reports						
Saved reports	Multiple schedules and custom FTP paths are now supported for saved reports.	19R2.0	●	●	●	●
Reference codes for ad hoc queries	Only active reference codes display in reporting filters.	19R1.1	●	●	●	●
Query updates for data quality reports	Queries used by some reports are updated to ensure that records are being correctly identified and record ownership is indicated.	19R1.1	●	●	●	●
Inbox						
Suspect Match	A link to the original add request is now available on the Suspect Match task.	19R2.0		●	●	
Task custom fields	Administrators can create custom fields to use on data change requests.	19R2.0		●	●	●
Subscriptions						
Job trigger enhancements	Administrators can view all job triggers in their Network instance from a new page. Additional updates have been made to enhance this feature.	19R2.0			●	●
Job triggers	Administrators can define actions to occur after a subscription job runs.	19R1.1			●	●
Loading data						
Match against OpenData	A maximum of 5000 matched OpenData records can be downloaded during a job.	19R1.1			●	●
Merge						
Bulk merge	Records with specific states will not be considered in bulk merge jobs.	19R2.0			●	●

			ST	DS	DM	AD

Match

Updates to default rules	The default match rules for the United States and Canada are updated to support the Address Lines Construction feature.	19R2.0			●	●

Data model

Cluster management	Cluster data is now supported for Canada, Norway, Poland, and Switzerland for specific providers.	19R2.0			●	●
Supported countries	A data model is added for Bosnia and Herzegovina, Estonia, Montenegro, North Macedonia, and Serbia. Reference data is translated for these countries, plus Iceland.	19R1.1			●	●
HCP opt-out	Bosnia and Herzegovina, Estonia, Montenegro, North Macedonia, and Serbia are added to the list of opted-out countries.	19R1.1			●	●

Profile layout configuration

Preview layouts	The option to preview profile layouts in the classic view is no longer available.	19R2.0			●	●
Geocodes	Latitude and longitude fields are added to the standard profile layouts for the supported countries.	19R2.0			●	●

Users

Additional permissions	Setting options for Compliance and Data Lineage are updated to reflect the new profile page.	19R1.1				●

Logs

Login Audit History	User type data is added to the audit table. Administrators can now filter the table by a user name and by user types.	19R2.0				●
Task Audit History	The Task Audit History page is updated to display the behavior consistent with the other audit history pages.	19R2.0				●

		ST	DS	DM	AD
API					
Version update	The Network API is updated to v18.0.	19R2.0		Developers	

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

Introduction

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

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

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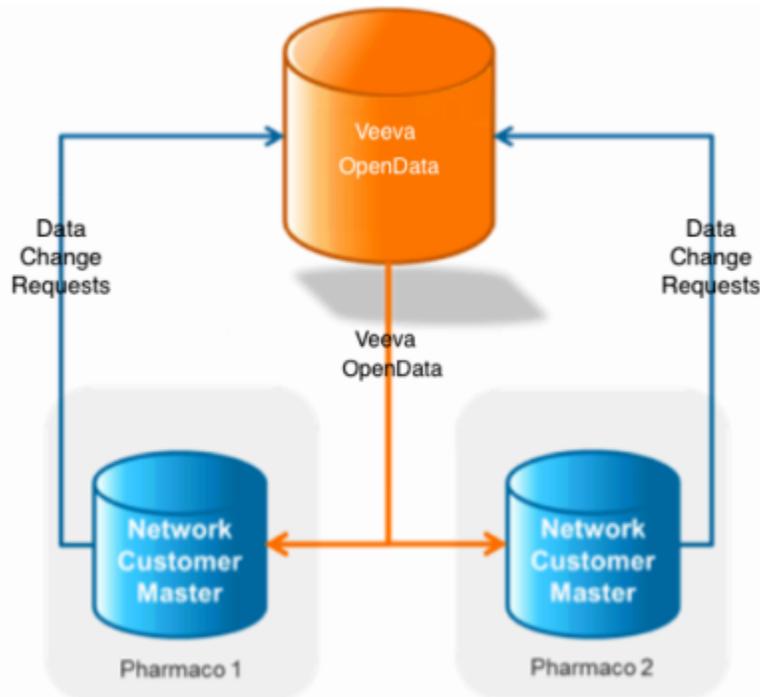
NETWORK CUSTOMER MASTER

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

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

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

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

General updates

TERMINOLOGY UPDATES

To support the diversity of objects (standard and custom) available in Network, the term *sub-object* replaces *child object* in the Network user interface and documentation. The change in terminology more accurately reflects the relationship between the main entity (HCP, HCO, or custom object) and its subordinate object.

Network object types

- **Entity** - HCPs, HCOs, and custom objects
- **Sub-object** - addresses, licenses, and custom sub-objects
- **Relationship objects** - parent HCOs and custom relationship objects

Network widgets

GENERAL AVAILABILITY

Network widgets are now available by default in your Network instance. Widgets are included in your Network license for an unlimited number of users.

The following widgets are available to use in your internal web-based applications:

- Search Widget
- Profile Widget
- DCR Widget

To configure a widget for your web-based application, in the Admin console, click **System Interfaces > Network Widgets**.

For more information about Network widgets, see the *Veeva Network Online Help*.

SEARCH WIDGET

The Search widget now resets when it is reopened in a pop-up window. Previously, searches would be saved, so records that had previously been selected were not available to select again.

This enhancement is enabled by default if you have configured your search widget to open in a pop-up.

Profile

CLASSIC VIEW

The classic profile view is now deprecated. All users are navigated to the new profile by default, and the link and button to return to the classic view is no longer available. The new profile became the default view in version 19R1.0.

SUB-OBJECT AND RELATIONSHIP OBJECT ENHANCEMENTS

The following updates have been made to the sub-object (previously called *child object*) and relationship object sections on record profiles.

Count of objects

The section header for sub-objects and relationship objects now includes a count so you can immediately know the number of objects listed. The count includes the total number of sub-object or relationship objects in the section, including inactive objects.

The **External Identifiers** section also includes a count of custom keys for the record

Primaries listed on summary cards

You can now view the list of primary business units for each sub-object and relationship object on its summary card. A **Primary** 🔖 icon displays on the summary card followed by a list of business units that are primary for that object. If multiple primaries are listed, a count of the remaining units displays at the end of the list. This applies to Unique Checkbox and Network Calculated primary fields.

The primary list does not display on child affiliations and controlling object records on a non-controlling profile.

Sort order of objects

Each sub-object and relationship object section on a profile lists all of those objects associated with the record. The sort order is updated to display primary objects at the top of the list so you can find those objects quickly.

Review the sort criteria for the object types to understand how they will display in each section.

Addresses sort order

1. Unique Checkbox primary fields (in descending order - addresses with the highest number of primary fields displays at the top of the list)

    Inactive addresses display in the list if they are primary so you are alerted about inactive primaries.

2. Network Calculated primary fields
3. Status - active addresses display
4. Highest ordinal (address rank)

Parent affiliations sort order

1. Unique Checkbox primary fields (in descending order - the affiliation with the highest number of primary fields displays at the top of the list)

    Inactive affiliations display in the list if they are primary so you are alerted about inactive primaries.

2. Status - active affiliations display
3. Affiliation name in alphabetical order

Licenses sort order

1. Unique Checkbox primary fields (in descending order - the license with the highest number of primary fields displays at the top of the list)

    Inactive licenses display in the list if they are primary so you are alerted about inactive primaries.

2. Status - active licenses display
3. License eligibility

    The previous sort order is then applied:

4. Licensing authority
5. Sample eligibility
6. Best State License (SLN followed by DEA)

To view inactive objects that are not primary, click the **Show inactive** link below the list.

## ENHANCEMENTS FOR PREVIEW BOXES

Find Suspect Match

This preview box now includes a **Delete** icon so you can quickly clear the default search text (the entity name and city) to add your own search term; for example, a Network entity ID (VID). Also, when you click inside the search field, the text is immediately highlighted so you can delete or overwrite it.
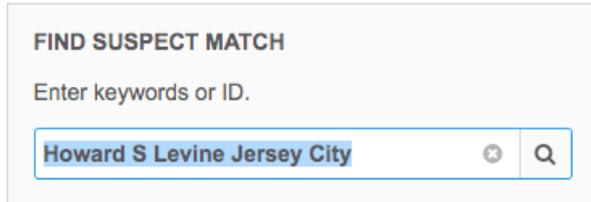
Revision History updates

Several updates have been introduced for this preview box:

- **Source name** - To help you quickly identify the sources that are contributing to the record data, this preview box now displays the name of the source that provided the add request or change request.
- **Today's date stamp** - If changes were made to the record today, the typical date stamp is replaced with "Today"; for example, **Today at 14:40:03 IST**.
- **Number of revisions** - Four of the latest revisions now display. Previously, two revisions displayed.
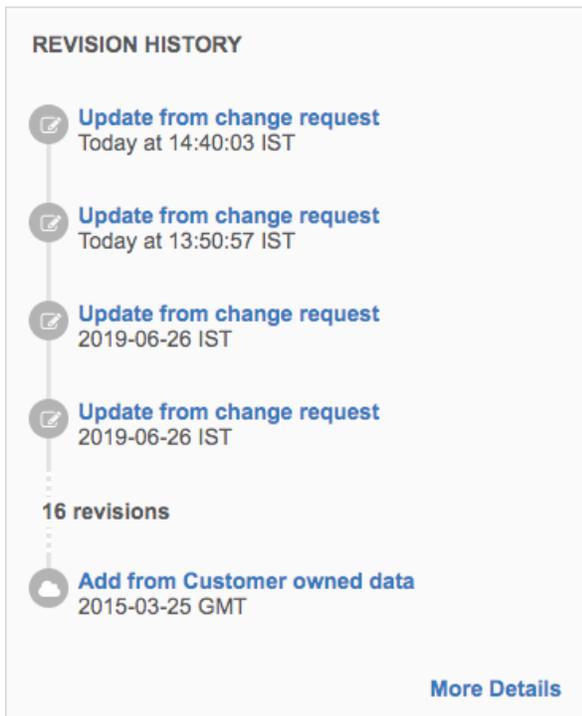
Data Lineage

This preview box is renamed to **Data Sources**. The box displays up to ten sources and provides a count for the remaining sources. Click **More Details** to view all of the source details.

Network Explorer

This preview box is renamed to **Hierarchy**.

Compliance Data

This preview box is renamed to **Transparency Reporting**.

MULTI-COUNTRY HCPS

On the profile page, a new link called **Multi-country HCP** displays on Veeva OpenData records when an HCP has a record in another country.

Some health care professionals practice in more than one country, particularly in Europe. In these situations, HCPs have a record for each country that they practice in so that country-specific data like local IDs and contact details is contained. However, it is valuable to know that records are for the same person; for example, for transparency reporting or for GDPR compliance (when HCPs request to have their data removed). The **Multi-country HCP** link enables you to easily identify and access records in other countries for the same HCP.

Enable the feature

This feature is available in your Network instance if you subscribe to Veeva OpenData records in Europe. It is not supported for records in other OpenData regions or for locally managed or third party managed records.

A new field, `link_vid__v`, is included in the Veeva OpenData subscription. Administrators must enable the field so the **Multi-country HCP** link can display on the profile page.

To enable the field:

1. In the Admin console, click **Data Model > Network Data Model**.
2. In the **Health Care Professional** section, find the `link_id__v` field.
3. Click the **Not Enabled** 🔴 icon.

The icon changes to the **Enabled** state ✅ to indicate that the field is now enabled.

In your Network instance, the field is populated for any HCPs that have records in more than one country and that OpenData has identified as a multi-country HCP. Only a very small number of HCPs have records in more than one country. For most HCP records managed by Veeva OpenData, the value of the field will be null and the **Multi-country HCP** link will not display on the HCP profile page.

View multi-country HCP records

The **Multi-country HCP** link is available only on Veeva OpenData records in Europe. You can view multi-country HCPs that you have access to through your data visibility profile. Also, you must have a subscription for the country to view the linked record.

On an HCP's profile page, the count of records in other countries displays in the summary header. If the HCP is not linked to a record in another country, the icon and link does not display.

Click the **Multi-country HCP** link to open a pop-up that displays the other records. The information is read-only. Click the HCP name to open that record in a new browser window.

If you do not have access to a multi-country HCP record through your data visibility profile, you can see that another record exists, but you cannot access it. The primary country and link ID displays in the pop-up.

Records that display as multi-country HCPs

It's useful to see multi-country HCP records, even if the record is no longer active. For example, an HCP might move from one country to another. OpenData will inactivate the HCP's record for the original country and create a new record for the new country. Linking the two records ensures that you can see that the HCP is the same person.

The following types of HCP records can display as a multi-country HCP:

- active
- inactive
- retired
- deceased
- valid

Records that are invalid, deleted, merged, and opted-out do not display.

Add multi-country records

The `link_vid__v` field is managed by Veeva OpenData only. Data change requests cannot be submitted for the field and it cannot be updated using the Network API or through source subscriptions.

To advise OpenData about a multi-country HCP, contact Veeva Support.

Report on multi-country HCPs

Users with access to advanced ad hoc reports can create a report to find the multi-country HCPs in their Network instance.

Use the following query:

```
SELECT
        vid__v,
        link_vid__v,
        first_name__v,
        last_name__v,
        primary_country__v
    FROM
        hcp
    WHERE
        hcp.link_vid__v IS NOT NULL
```

Example query results

Ad Hoc Match

PERMISSIONS

Multiple data visibility profiles (DVPs) can be assigned to a user profile. You must have permission to create ad hoc match jobs for each DVP assigned to your user profile. If the **Read-only access** permission is set to *True* for any of the assigned DVPs, ad hoc match jobs cannot be run; the **Match New File** button will not display. Previously, the Matched Files page still displayed a **Match New File** link but it navigated you to another page depending on your user type.

If you previously created ad hoc match jobs but the **Read-only access** permission was then changed to *True* on an assigned DVP, previous jobs will still display on the Matched Files page. Administrators can view jobs previously run by all users.

The following DVP permissions are required for creating ad hoc match jobs:

- **Ad hoc match** - Must be set to *True* for **Ad Hoc Match** to display on the Network menu bar.
- **Read-only access** - Must be set to *False* for the **Match New File** button to display on the Matched Files page.

These permission values must be set for each data visibility profile assigned to your user profile.

USABILITY UPDATES

The Matched Files page and the Match New File page are updated with the following enhancements.

Description updates

Users can now add descriptions after a match file has been uploaded on the Match New File page. Previously, the **Description** field could not be updated after a file was uploaded. The description displays on the Matched Files page and is helpful for identifying your match job.

Match file column headers

In Step 4, if the incoming file includes column headers, select the **First column contains headers** option, as usual. The first column in the table is now renamed to **Column Headers** and the rows in the column are emphasized to make it obvious that they contain header information. The second table column becomes **Entry1** and contains the first entries from your file. Previously, the first column remained **Entry 1**.

Saved field mappings

If you use previously saved field mappings for your new job, an informational message with the name of the saved file now displays above the table. Click the **Reset Fields** link to remove the mappings.

Selected fields

It is now easier to see the fields that will be included in your exported match file because Step 5 is updated to display the field names. Previously, a count of fields displayed; for example, **4 of 15 Fields Selected**. Now, the row displays field names and count of any additional fields that cannot be listed. Click the **Edit** button to open the **Choose fields to export** dialog to view all of the selected fields.

Matched files filters

The Matched Files page can be filtered so you can quickly find specific jobs that have previously been run. The filters are wider and the list option text does not wrap, making the options easier to read.

SORT ORDER FOR EXPORTED SUB-OBJECTS

When you create an ad hoc match file, you can configure the number of sub-objects (previously called *child objects*) that you want to export in the results. The rules that determine which sub-objects are exported have been updated to ensure that the most relevant ones are included in your results. There are specific sorting rules for each sub-object type.

Addresses

The addresses that are included are determined using the following sort order:

1. Ordinal (`address_ordinal__v`) - In ascending order (highest (1) to lowest).
2. Status (`address_status__v`) - Active (A) before Inactive (I).
3. Type (`address_type__v`) - Sorted in the following order:
    a. Professional (P)
    b. Professional and Preferred Mail (B)
    c. Mail Only (M)
    d. Address (U)

Licenses

The licenses that are included are determined using the following sort order:

1. Best state license (`best_state_license__v`) - Records with this field set to `Y` followed by licenses with this field set to any other value.
2. Status (`license_status__v`) - Active (A) before Inactive (I) before Status Unknown (X).
3. Most recently modified licenses (`modified_date__v`)

Parent HCO

The Parent HCOs that are included are determined using the following sort order:

1. Status (`parent_hco_status__v`) - Active (A) before Inactive (I).
2. Most recently modified Parent HCOs (`modified_date__v`).

USABILITY UPDATES

The ad hoc match feature was updated in version 19R1.0 to improve the usability of the match configuration. Additional updates were made in version 19R1.1.

Match source column

In 19R1.0, the ability to match against Veeva OpenData records became available if specific conditions are met. In the exported match file, a new column called **Match Source** was added to indicate if the match was found in the Network instance (*Local*) or the Veeva OpenData instance (*Master*). The column is updated to now display *OpenData* instead of *Master* if the match was found in the OpenData instance.

Timestamp

The **Start Time** column on the Matched Files page has been updated to include the seconds beside the hour and minute in the timestamp. Previously, the seconds displayed zeroes (0).

LOGS

Ad hoc match actions are now tracked in the System Audit History log. Administrators can view when the actions occurred and by which user.

Logged actions:

- running jobs
- downloading input files
- downloading match results
- deleting jobs

Custom objects

NETWORK EXPLORER

Users can now view relationships between custom objects on the Network Explorer canvas. Previously, custom objects could not be viewed in Network Explorer. Use the feature to quickly visualize and understand large data sets.

This enhancement is available by default if custom objects are enabled in your Network instance.

To view custom objects in a hierarchy view, open Network Explorer using one of the following ways:

- Click **Network Explorer** in the **Hierarchy** preview box on a custom object record profile
- Click **Network Explorer** on the Network menu bar and search for the custom object.

  The search results will display custom objects that you have access to through your assigned data visibility profiles.

Viewing objects and relationships

Custom object and relationships details are available using the same methods as Veeva standard objects.

Hover over an entity to view a business card with relevant details and click the entity name link to open the profile in a new browser window.
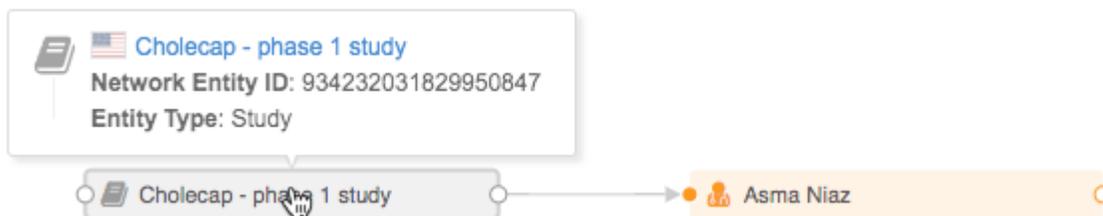
Hover over a connecting line between two objects to view relationship details. Click the solid circles on an object to expand affiliations. Circles on the left side of the object display non-controlling objects; circles on the right side of the object display controlling objects.
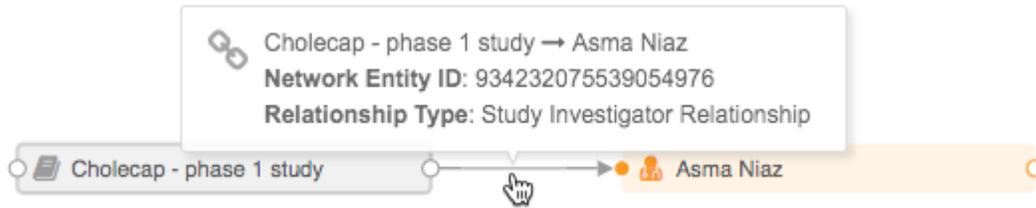

For more information about viewing affiliations and working with the canvas, see the Network Explorer topics in the *Veeva Network Online Help*.

Filtering the canvas

The custom object hierarchy can be filtered using the field values of custom objects or custom sub-objects.

To create a filter:

1. Click **Filter** and click **+ Add Filter**.
2. Type a **Filter Name**.
3. In the **Conditions** section, expand the list and choose the custom object.
4. Choose the field, condition, and field value that will be applied to the selected custom object.
5. Click **Save and Apply** to save the filter and immediately filter the canvas.
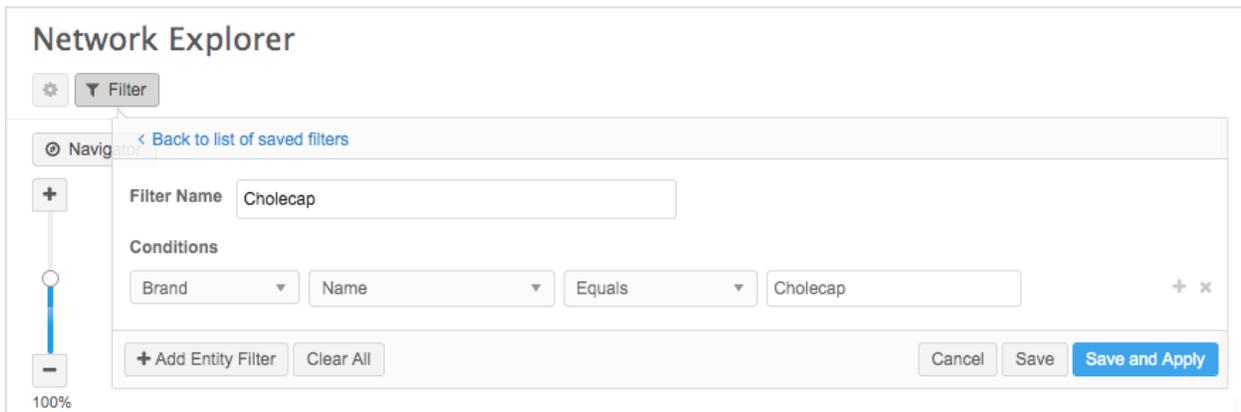
Filters created for sub-object fields are applied to the object that controls the sub-object.

For example, creating a filter for a Certification custom sub-object would be applied to its controlling object, HCPs. The Network canvas could be filtered for HCPs that have valid (non-expired) certifications.

Example filter

Feature options that are not supported

In this release, Network Explorer does not support the following options for custom objects:

- **View profile** - Previewing a record profile on the Network Explorer canvas is not supported for custom objects. On a Veeva standard object, the profile can be accessed by right-clicking on the entity node and selecting **View Profile**.
- **Edit mode** - Custom objects cannot be managed using the Network Explorer canvas. Edit mode is available for data stewards and data managers because Veeva standard objects can be added and affiliated to other standard objects in the hierarchy, but custom objects cannot be added or affiliated to other objects.

DATA CHANGE REQUESTS

Users can now submit add and change requests for custom objects using the Profile page or the My Requests page. Previously, only data stewards could add or update custom objects and the changes would be automatically approved. Now, administrators can configure workflow settings to support add and change requests for custom objects and determine whether the DCRs are routed to data stewards or automatically approved.

These enhancements are available by default if you have custom objects in your Network instance.

Define custom object workflow settings

To specify workflow settings for a custom object:

1. In the Admin console, click **Settings > Custom Object Workflow Settings**.
2. Select a custom object from the list.

    The Workflow Settings page opens.

RESEARCH__C Workflow Settings

▼ **Settings**

    ✔ **General Workflow Settings:**

      ☐ Strong Match

      ☐ Create Unverified

    ✔ **Overwrite Object Comparison**

        Sub-Objects

        Condition   ◯ Include Status ◉ Exclude Status

        Relationship Objects

        Research Facility   ◯ Include Status ◉ Exclude Status

        Research Investigator   ◯ Include Status ◉ Exclude Status

    ✔ **Auto-Approve On New Records Creation**

        Objects   ☐ Clinical Research

        Sub-Objects   ☐ Condition

        Relationship Objects   ☐ Research Facility

                ☐ Research Investigator

    ✔ **Auto-Approve Existing Records Change Requests**

        Objects   ☐ Clinical Research

Edit

3. In the **Settings** section of the page, click **Edit**.
4. In the **General Workflow Settings** section, you can enable the following features for the custom object:
    - **Strong Match** - Determines whether an add request goes through or bypasses strong matching when creating an unverified record. Bypass a strong match to immediate create an unverified record so the Veeva ID can be used by the calling application. Not selected by default.
    - **Create Unverified** - Immediately create a record when an add request is submitted. Not selected by default.

5. In the **Overwrite Object Comparison** section, determine the status of the related sub-objects and relationship objects for unverified records.

   - **Include Status** - During sub-object comparison, consider the record status for matching.
   - **Exclude Status** - During sub-object comparison, do not consider the record status for matching. (Enabled by default).

6. In the **Auto-Approve on Add Requests** section, select the custom object type if add requests should be auto-approved. If the custom object type is not selected, add requests are routed to local data stewards for processing.

7. In the **Auto-Approve Change Requests** section, select the checkbox if changes for the custom object (including the related sub-objects and relationship objects) should be auto-approved. Otherwise, changes are routed to local data stewards for processing.

8. **Save** your changes for this section.

9. *Optional*. In the **Country Exceptions** section, click **+Add Exception** to specify countries where these settings should be different.

Updating workflow settings for Veeva objects

Custom sub-objects can be associated to Veeva standard objects (HCOs, HCPs). The Workflow Settings page now supports defining the add request behavior for these objects on HCPs and HCOs.

To specify the workflow settings for custom sub-objects:

1. In the Admin console, click **Settings > Workflow Settings**.
2. In the **Default Workflow Settings** section, click **Edit**.

3. In the **Overwrite Object Comparison** section, custom sub-objects and relationship objects that are associated with HCPs or HCOs are listed. Choose whether you want to consider (**Include Status**) or not consider (**Exclude Status**) the record status for matching. **Exclude Status** is selected by default.

4. In the **Auto-Approve on New Custom Owned Records Creation** section, expand the **New Sub-objects** list and select any custom sub-objects that you want to be automatically approved. Only custom sub-objects that are associated to HCOs and HCPs are listed.

5. **Save** your changes.

6. *Optional*. In the **Country Exceptions** section, click **+Add Exception** to specify countries where these settings should be different.

Configure inbox task groups for custom objects

To support add and change requests, configure the inbox task groups to ensure the DCRs are sent to the appropriate data stewards. This is useful if you have data stewards with specific knowledge for custom objects. If an inbox task group is not defined for the custom object, DCRs are sent to your default routing group. Only data stewards and data managers who have permission to the custom object through their data visibility profile can access the DCRs in the inbox.

To determine the routing criteria for custom object stewardship:

1. In the Admin console, click **Users > Inbox Task Groups** and select an existing group.

    In the **Routing of Add/Change Requests** section, all of the custom objects in your Network instance are listed.

2. Beside each custom object, expand the list and select either **Send to this group** or **None sent to this group** (default).

Note: Data change requests for custom objects are never routed to Veeva OpenData or third party master data stewards.

My requests

Users can submit add requests for custom objects from the My Requests page or the Profile page. After an add request or change request is submitted, users can track it from the My Requests page.

Stewarding DCRs

Add and change requests for custom objects are either automatically approved or routed to local data stewards. The inbox displays DCRs for custom objects. Data stewards that have access to custom objects can find the DCRs by filtering the inbox or by searching by task ID. Data stewards that do not have access to the custom object through their data visibility profile will see a **Lock** icon in the inbox and will be unable to open the task.

	ENTITY		TYPE	SUMMARY
☐	Q Keyword		Select options ⇕	Q Keyword
☐	👤 Lee A Vanhouten-Sauter	☆	Change Request	Change License SubType and one other field
☐	🏢 Heart And Vascular Associates Of Northern Jersey	☆	Suspect Match	1 suspected matches
☐	👤 Type 1 Diabetes	☆	Change Request	Change Organization and 2 other fields
☐	🔒 Gayle DanOtter		Add Request	Employee

Data stewards can process add and change requests for custom objects in the same way they process Veeva standard objects. Associated tasks display by default. In-Queue tasks display if the **Create Unverified** setting is enabled in the custom object workflow settings.

Inbox > Add Request - Type 1 Diabetes   View 2 associated tasks on this page

Add Request   Re-assign Reject Save Apply   ▾ REQUEST SUMMARY

                                                                        Task ID
                                                                        9344322966657355167

 All Fields   DCR Fields   Subject
                                                                        Type 1 Diabetes
                                                                        New Record Request
                        Add Request   Approved? ▾   Creator
                                                                        admin@verteo.com
 Name   Type 1 Diabetes   ✔ ✕ ✎   Source
                                                                        Entity Profile Editor
 › CONDITION (NEW)   ✔ ✕ ✎   Date Created
                                                                        2019-05-06 20:35:56 IST
   Conditions   High BP   ✔ ✕ ✎   Requester Comments

   Symtom   Dizziness   ✔ ✕ ✎   Assignee
                                                                        jessie.steward@verteo.com
   Network Entity ID   No Value   Status
                                                                        🟡 Pending Review
   Status   Active   ✔ ✕ ✎
                                                                        ▸ COMMENTS (0)
 › RESEARCH INVESTIGATOR (NEW)   ✔ ✕ ✎

   Investigator *   Carolyn Schwartz   ✔ ✕ ✎

   Record Owner Name   No Value

   Entity Type of the non-controlling object   No Value

   Status   Active   ✔ ✕ ✎

 › RESEARCH FACILITY (NEW)   ✔ ✕ ✎

   Research Facility * Chili Family Medical   ✔ ✕ ✎

   Entity Type of the non-controlling object   No Value

   Status   Active   ✔ ✕ ✎

Managing configurations

Workflow settings for custom objects can be included configuration export packages and imported to target environments. When you are adding configurations to your export package (**Settings > Configuration Export**), workflow settings for custom objects are located in the **Custom Object Workflow Settings** node.
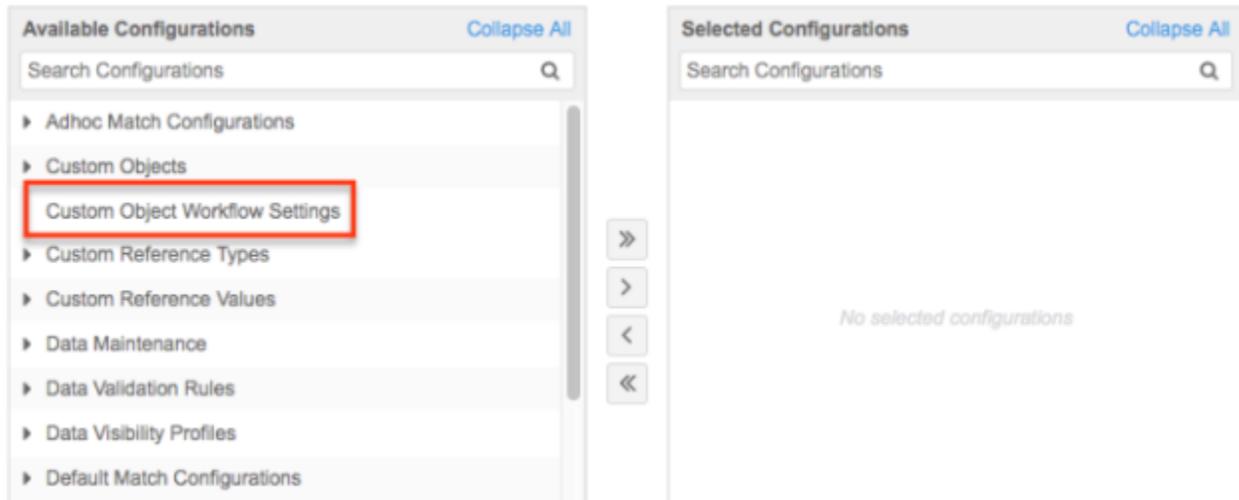
API considerations

The Change Request API is updated to support custom objects. Note that the API call for custom sub-objects and relationship objects is different than the API call for Veeva standard sub-objects; custom sub-objects and relationship objects must be grouped by "set". For example, in the API call below, the CONDITION__C custom sub-object is `condition_set__c`".

Sample Create Change Request API

```
{
    "metadata": {
        "creator": "system.admin@verteodev.vdmdev.com",
        "note": "Test Adding New Studies via API",
        "source": "test"
    },
    "entity_type": "STUDY__C",
    "entity": {
        "nct_id__c": "2344568",
        "phase__c": "1",
        "primary_country__v": "US",
        "study_name__c": "CARD2344568",
        "condition_set__c": [{
            "condition_status__c": "A",
            "condition_name__c": "Name"
        }]
    }

}
```

Reporting

Users with access to advanced ad hoc queries can report on change requests for custom objects.

Example query

```
SELECT
        change_request_id,
        change_request_type,
        subject,
        vid__v,
            entity_type,
        state_key,
        resolution,
        created_date
    FROM
        change_request
    WHERE
        entity_type = 'FOOTPRINT__C'
    ORDER BY
        created_date ASC
```

Example query results

Reports

SAVED REPORTS

The following enhancements have been made to saved reports.

Multiple schedules

Multiple schedules are now supported for saved reports. Previously, only a single schedule could be configured for a saved report. You can edit your own saved reports and any reports that have been shared with you.

To create multiple schedules for a saved report:

1. On the Network menu bar, click **Reports > All Reports**.
2. Select a report.
3. In the **Schedule** section, click **Enabled**.
4. Define the frequency and time for the schedule and click **Done**.
5. To create another schedule, click **+ Add Schedule**.

The **Schedule** section will list all of the schedules created for the report.

FTP directory

If you save the report results to FTP, you can choose to save to the default FTP directory or you can specify a different directory. Specifying a directory enables you to start subscriptions and retrieve the report results directly from your specified directory; for example, you can run a target subscription using the report results to export the data to downstream systems.

Each time the report runs, the results are placed in a new folder. The **Results Folder** identifies the name of the folder so you can easily retrieve your results. The naming convention for the results folder is: *<report title>_<report ID>_<report run ID>*; for example;
Address_Updates_934742267400356255_934765356515328415.

After you run the report, the **FTP Directory** and **Results Folder** columns display in the Result History table so you can easily find your report results.

REFERENCE CODES FOR AD HOC QUERIES

Reference codes that are not enabled for any country no longer display as filter options when you are creating an ad hoc query from the **Basic** and **Counts & Summaries** tabs or from the typeahead on the **Advanced** tab. Previously, all valid reference codes displayed in the filter lists whether they were enabled for any country or not, so the lists were very long. Removing reference codes that are not active for any country ensures that the lists are shorter and applicable to your data.

This enhancement is enabled by default for all Network instances.

Inactive reference codes (codes that are no longer enabled for any country) can still be queried manually using advanced reports. For example, to find records that are still using an inactive code, include the code in a query from the **Advanced** tab.

QUERY UPDATES FOR DATA QUALITY REPORTS

Queries used by some data quality reports are updated to ensure that the correct records are being identified and that issues on locally managed records are clearly indicated.

The query updates will occur by default in any instance where these data quality reports have been enabled. If a data quality report has been edited in an instance, the query will not be updated. If you have modified any of the affected data quality reports in your Network instance, Veeva will contact you directly to discuss these new updates.

Query updates

The following three updates have been made to queries for some data quality reports.

Update 1- Exclude opted-out records

Opted-out HCP records are excluded from some data quality reports. Opted-out records are currently being included which can result in records being flagged by a data quality report unnecessarily. The query is updated to check the value of the `data_privacy_opt_out__v` field for the HCP record.

Update 2 - Check sub-object ownership

Data quality report queries for sub-objects are updated to check the check the ownership of the sub-object records in addition to the owning entity. This refines the results and more clearly indicate record ownership for data quality issues on sub-objects (addresses, license or Parent HCOs). The query is updated to set the `is_veeva_master__v` field to the Address object.

After the query is updated, when you select the record ownership for a report that looks for data quality issues for sub-objects (addresses, licenses or Parent HCOs), the ownership reflects the sub-object and not the owning entity (HCP, HCO).
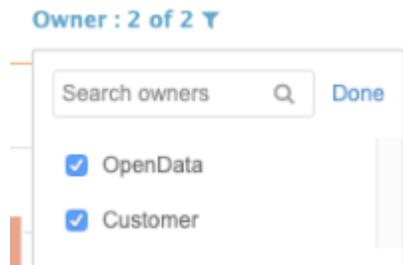
Update 3 - Correct query syntax

The query for one data quality report, Address - Improper Postal Code (CA), is rewritten to correct the syntax so only problematic records are flagged by this report.

Affected data quality reports

One or more of the updated queries will be applied to the data quality reports listed in this table. The query updates for each report are also listed.

Data Quality Report Name	Update to be Applied
Address - Improper Postal Code (CA)	1. Exclude opted-out records 2. Check sub-object ownership 3. Correct query syntax
Address - Incomplete Active Address Line 1	1. Exclude opted-out records 2. Check sub-object ownership
Address - Missing Address Type	1. Exclude opted-out records 2. Check sub-object ownership

Data Quality Report Name	Update to be Applied
Address - Missing City	1. Exclude opted-out records 2. Check sub-object ownership
Address - Missing State/Province	1. Exclude opted-out records 2. Check sub-object ownership
Address - No Active Address	1. Exclude opted-out records
Address - No Active Address	1. Exclude opted-out records
Fax - Incomplete Address Fax Number	1. Exclude opted-out records 2. Check sub-object ownership
HCP - Missing Gender	1. Exclude opted-out records
HCP - Missing NPI (US)	1. Exclude opted-out records
License - DEA License with License Status Condition populated (US)	1. Exclude opted-out records 2. Check sub-object ownership
License - HCPs with same Best State License (US, CA)	1. Exclude opted-out records
License - Missing Best State License Flag (US, CA)	1. Exclude opted-out records 2. Check sub-object ownership
License - Missing License - Prescribers Only (US, CA)	1. Exclude opted-out records
License - Missing License Authority (US)	1. Exclude opted-out records 2. Check sub-object ownership
License - Missing License Eligibility (US)	1. Exclude opted-out records 2. Check sub-object ownership
License - Missing License Expiration Date	1. Exclude opted-out records 2. Check sub-object ownership
License - Missing License Number (US, CA, BR)	1. Exclude opted-out records 2. Check sub-object ownership
License - Missing License Type	1. Exclude opted-out records 2. Check sub-object ownership
Name - First Name same as Last Name	1. Exclude opted-out records
Phone - Incomplete Address Phone Number	1. Exclude opted-out records 2. Check sub-object ownership
Phone - Missing Address Phone Number	1. Exclude opted-out records 2. Check sub-object ownership
Relationship - Missing Relationship Type	1. Exclude opted-out records 2. Check sub-object ownership
Specialty - Missing Specialty - Prescribers Only (US, CA)	1. Exclude opted-out records

Inbox

SUSPECT MATCH

Data stewards and data managers can now view a link to the original add request from a suspect match task. If a suspect match originated from an add request, it is helpful to view the add request to see why the suspect match task was created. In the **Task Details** section, click the add request ID link to open the add request in another browser window.

TASK CUSTOM FIELDS

Administrators can define custom fields for data change requests to use for data stewardship purposes. For example, custom fields can be created to track data quality and correctness, or for data stewards to provide additional information during DCR processing like call verification attempt date and time.

These custom fields will display on add requests and change requests if data stewards and data managers are given access to the fields. The fields are for internal use only; they are not added to the change request API response and cannot be seen by the user that submits the DCR.

This feature is enabled by default in your Network instance.

Create a field

Add task custom fields so they display on data change requests. For example, you might add a couple of fields to track data quality: one field to select a data manager as an approver (**QA Approver**), and another field so the approver can specify the date that the quality check was completed (**QA Approval Time**).

To create a task custom field:

1. In the Admin console, click **Data Model > Task Custom Fields**.
2. Click **Create Custom Field**.

3. Type a relevant **Name** and **Description**.

4. Select the field **Type**. For example, if you create a field for a QA Approver, choose the **User** type which contains the list of active Network users.

   These types and supported field values are available:

   - **Decimal** - Supports any whole number or fraction.
   - **Integer** - Supports any whole (non-fraction number).
   - **Text** - Supports any combination of letters, numbers and symbols.
   - **Date** - Supports any date (month, day, year) as well as a pop-up calendar.
   - **Date & Time** - Supports any date formats (month, day, year) and time combination (hour, minute, second).
   - **Reference** - Supports values defined in the associated reference type list. You must select the reference type used for displaying the list of allowed values in the custom field.
   - **User** - Supports any active Network users. This field type is new and available only for task custom fields.

5. The field is **Enabled** by default. Clear this setting if you do not want the task custom field to display on data change requests yet.
6. In the **Permitted Users** section, click the **Add users** link to specify the users that will have access to the field.
7. In the **Select users** dialog, search for and select the users. These users will have access to view the field and edit the field value. Click **Apply**.
8. In the **Labels** section, enter the field name that will display on the data change request page. To add a label for more languages, click **Add Language**.
9. **Save** your changes.

The field is enabled by default and is now listed on the Task Custom Fields page. The order that the fields are listed on the page is the order that they will display on data change requests. Administrators can use the handle ☰ to reorder the fields. Data stewards and data managers with access to the fields will see the fields on data change requests.

Task Custom Fields

Create Custom Field

☰	NAME	LABEL	TYPE	REFERENCE TYPE	
☰	reviewstatus__c	Review Status	Reference Type	AddressStatus	✔
☰	qa_approver__c	QA Approver	User		✔
☰	review_date_time__c	Review Time	Date and time		✔
☰	qa_date__c	QA Approval Time	Date and time		✔
☰	last_call_verification__c	Last Call Verification Time	Text		✔

Adding the fields to your inbox

Users that have access to the task custom field can add it to their inbox. For example, if data managers want to immediately view the tasks that have been validated for quality, they can add the **QA Approver** and **QA Approval Time** task custom fields to the beginning of their inbox.

| Country ▾ | Task Status ▼ | Source Systems ▾ | Reset filters | | Enter task id | View | ↓ Sort by Time | ⟳ | ▯ | ⚙ |

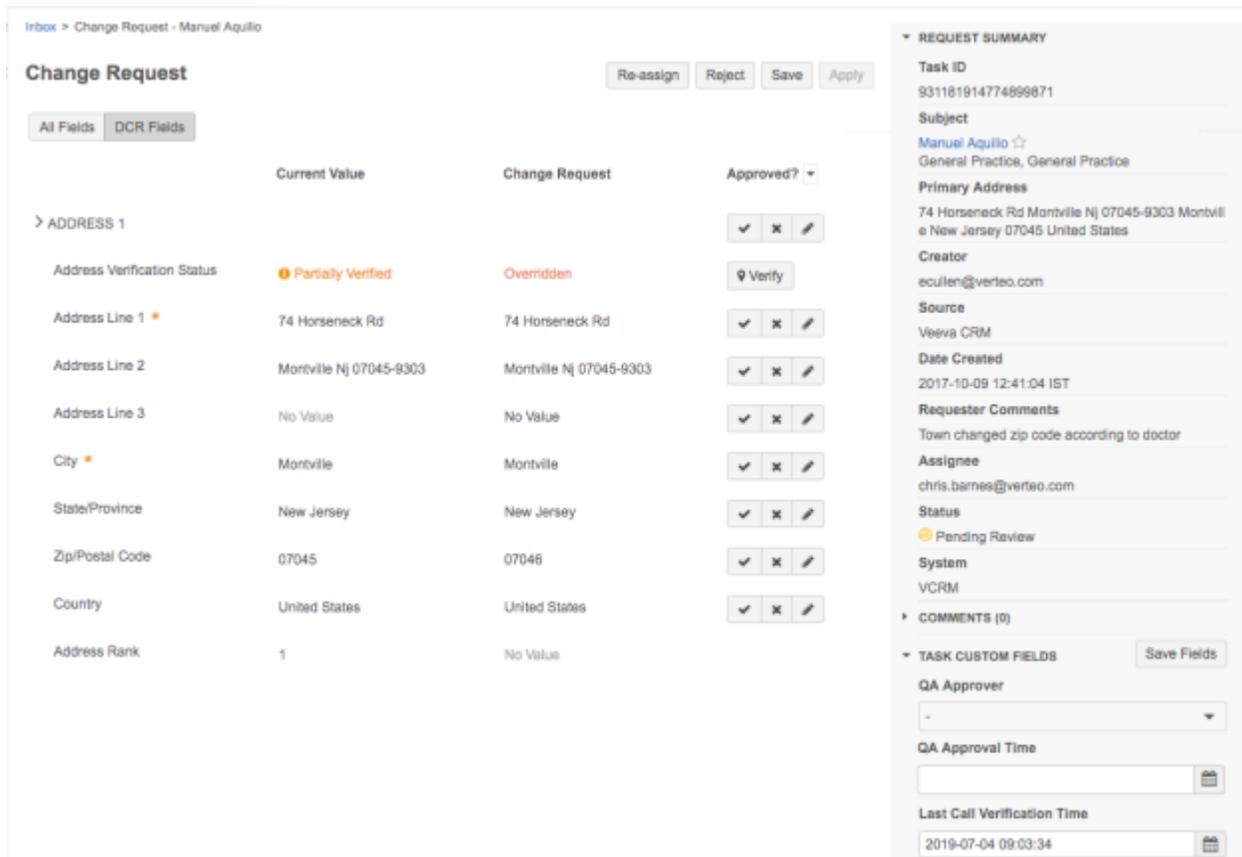|	QA APPROVER	QA APPROVAL TIME		CREATOR	ENTITY	
☐	Select options ⇕	📅 - 📅		Q Creator	Q Keyword	
☐				Dataflow	👤 Samuel Friedman	☆
☐				ecullen@verteo	👤 John A Difilippo	☆
☐	susan.james@verteo.com	2019-06-21 02:57:23 IST		ecullen@verteo.com	👤 John A Difilippo	☆
☐				scott.woods@verteo.com	👤 Barbara Jo Mcgarry	☆
☐				ecullen@verteo.com	👤 Manuel Aquilio	☆

To add the columns to your inbox:

1. Click **Select Columns** ⊞ .
2. In the **Available Columns** pane, expand the **Task** section and move the columns to the **Selected Columns** pane.
3. Use the handle ☰ to reorder the layout of columns for your inbox.
4. Click **OK**.

The columns now display in your inbox. You can filter the inbox by search the columns by keyword or by selecting one or more users from the list on user type columns.

Stewarding the task custom fields

On data change requests, the fields are listed in the **Task Custom Fields** section in the right pane.

In this example, a data steward might process the task and then reassign it to a data manager to review for data quality. The data manager can update the task custom fields to indicate that the review is complete.

Reporting

Users with access to advanced ad hoc queries (**Reports > Ad Hoc Queries**) can see task custom field values when they run reports on change requests. If users do not have access to the task custom fields, the columns display but they do not contain data.

For example, run the following query to view the data change requests that have an 'F' data quality status for a specific data steward.

```
SELECT
        *
    FROM
        change_request
    WHERE
        qa_status__c = 'F'
        AND assignee__c = 'wendy.smith@verteo.com'
```

Logs

Administrators can view changes to the fields and values in the following logs

- **System Audit Log** - Tracks new fields and updates to existing fields are tracked.
- **Task Audit log** - Tracks changes that are made to field values on data change requests.

Subscriptions

JOB TRIGGER ENHANCEMENTS

Job triggers were introduced in version 19R1.1. The following updates have been made in version 19R2.0 to enhance the feature

View all subscription triggers

Administrators and data managers can now view all of the job triggers that have been created in their Network instance in one place. The new Job Triggers page lists all of the triggers that are configured, not only triggers that have run. This is helpful to see what jobs will trigger another job to start.

To review a complete list of the triggers in your Network instance, in the Admin console, click **System Interfaces > Job Triggers**.

The page lists the triggers by subscription type. Click the column header to sort each list.

List of Job Triggers

Search triggers... 🔍   Export as CSV

SUBSCRIPTION TYPE ⌃	SUBSCRIPTION NAME	TYPE	CONDITION	ACTION
Data Maintenance	Network Address Inheritance	Email	Not Successful	Send ema
Data Maintenance	Network Address Inheritance	Job	Complete	Start subs
Data Maintenance	Network Address Inheritance	Job	Complete	Start subs
Source Subscriptions	Account_update_nf	Job	Complete	Start subs
Source Subscriptions	Account_update_nf	Email	Not Successful	Send ema
Target Subscriptions	Networkexport	Job	Complete	Start subs
Target Subscriptions	Networkexport	Email	Not Successful	Send ema
US Compliance Target Subscription	US Compliance Target Subscription	Job	Complete	Start subs
Veeva OpenData Subscriptions	Open Data AU	Job	Complete	Start subs
Veeva OpenData Subscriptions	Open Data US	Email	Not Successful	Send ema

Job triggers can be created for any subscription job in the Network UI. Navigate to the individual subscription page to create a job trigger.

Creating triggers

When you create a job trigger, unsuccessful job conditions are now grouped together. Previously, individual conditions were available for when a job fails, is canceled, or is killed. Job triggers that have been configured with the previous conditions will be automatically updated.

Email triggers

Users who receive emails for job outcomes will now see the job status in the email.

Possible statuses that will be reported on the email:

- The job status is FAILED.
- The job status is CANCELLED.
- The job status is KILLED. (Occurs when Veeva Network manually stops a job).
- The job status is COMPLETE.
- The job status is PAUSED. (Used for data deduplication jobs. Jobs can be paused during testing).
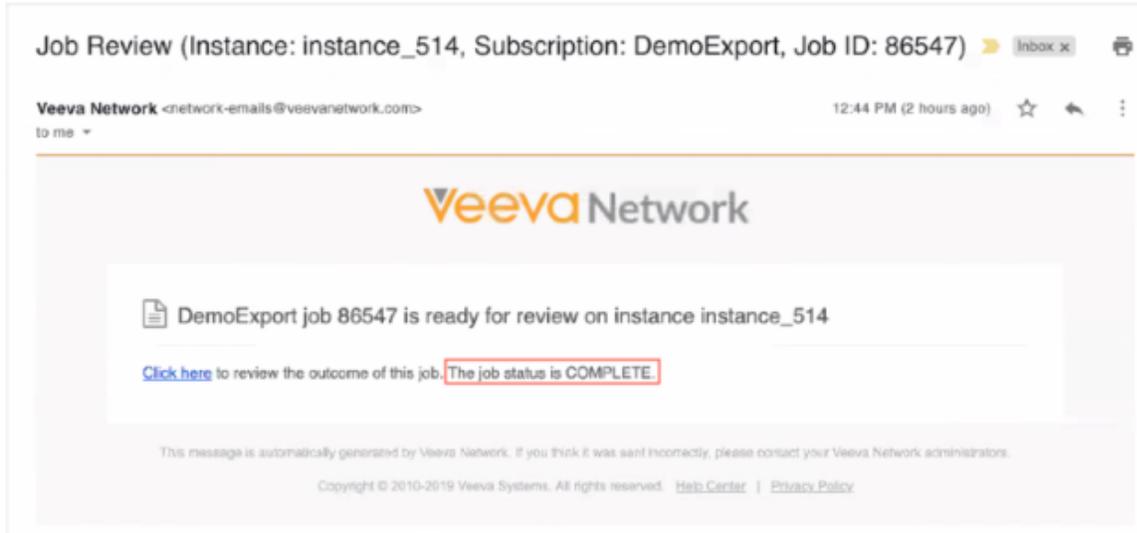
Disabled subscriptions

The jobs that are available to trigger include active subscriptions in your Network instance. If a feature is disabled after it has been enabled; for example, US Compliance or Network Address Inheritance, any existing triggers that used the subscription remain in the list, but are appended to indicate that they are disabled.

JOB TRIGGERS

In subscription configurations, administrators and data managers can choose to trigger other actions to start after a job runs. The available triggers include sending emails for various job outcomes or starting another job when the original job successfully completes. Job triggers are available for all of Network's subscription features.

This feature is enabled by default in your Network instance.
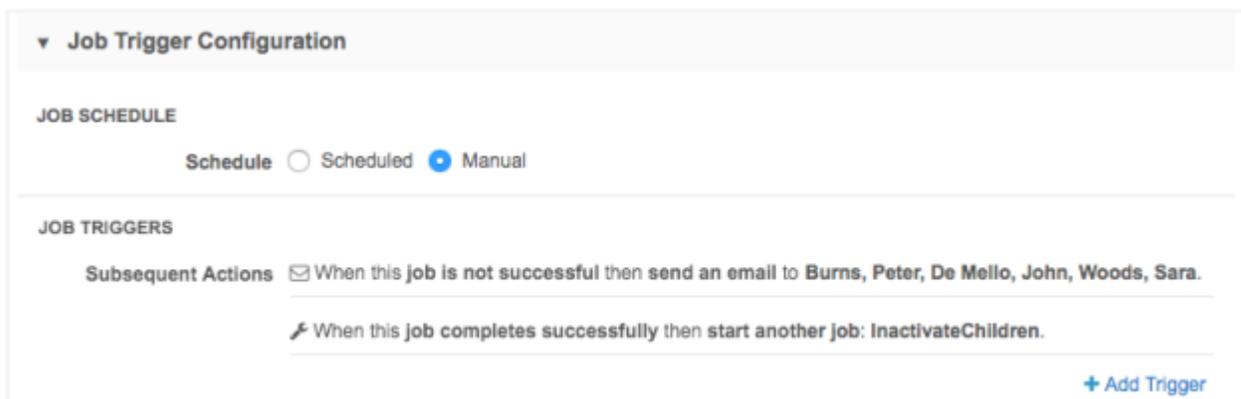
Setting a job trigger

When you configure a new subscription or edit an existing one, you can choose to send an email to specified users based on the job outcome or set another job to start if the original job completes successfully.

To set a job trigger:

1. In the Admin console, open an existing subscription or create a new subscription.
2. Under the **Job Trigger Configuration** heading near the bottom of the page, set the job schedule.

3. In the **Job Triggers** section, click **+ Add Trigger**.
4. Expand the **When this happens** list and choose the job outcome that will trigger the action.
5. Expand the **Do this** list and select one of the options:
   - **send an email** (available for all job outcomes)
   - **start another job** (available only for the **job completes successfully** outcome).
6. If you selected **send an email**, expand the recipients list and select all of the Network users that should receive an email for that job outcome. Multiple recipients can be selected.
7. If you selected **start another job**, expand the subscription list and choose the job to start. The subscriptions are categorized by type. The **Data Maintenance** category also includes Cluster Management subscriptions and Network Address Inheritance subscriptions. The **OpenData subscription** category lists your country subscriptions using the 2-digit country code.
8. Click **Done**.

Multiple actions are supported, so you can click **+ Add Trigger** to create additional job triggers.

Send email

One job trigger option is to configure the subscription to send an email to defined recipients based on the job outcome.

To avoid spamming users, reserve Complete outcome emails for jobs that run infrequently or for jobs that you are testing. In general, trigger emails for outcomes that are unexpected or that require user action.

The email is sent to users as soon as the job reaches the defined outcome.

Recipients

For each job trigger to send an email, you must specify the Network users that should receive the email.

Only active users for your Network instance can be selected from the list. After a user is selected, if they become inactive in Network, they will be removed from the recipient list if the trigger is edited. If the user becomes active again, their name will be added to the list if the trigger hasn't changed.

Email details

When users receive a job email, it is sent from `network-emails@veevanetwork.com` and it displays the following subject:

Job Review (Instance: *<instance name>*, Subscription: *<subscription name>*, Job ID *<ID>*)

The email contains the following information:

- Job ID
- Source subscription name
- Network instance name and ID
- Link to the job page that automatically displays if they are already signed into Network. Otherwise, the Network login page displays.

Start another job

If a subscription job completes successfully, you can choose to start another job. No other job outcomes can trigger another job to start.

One or more jobs can be started after the original subscription completes. For example, after an OpenData subscription (cs_import) completes, you might want to run a child inactivation job to clean up any sub-objects that are still active on inactive records. After that job runs, you might also start a target subscription to push those updates to downstream systems.
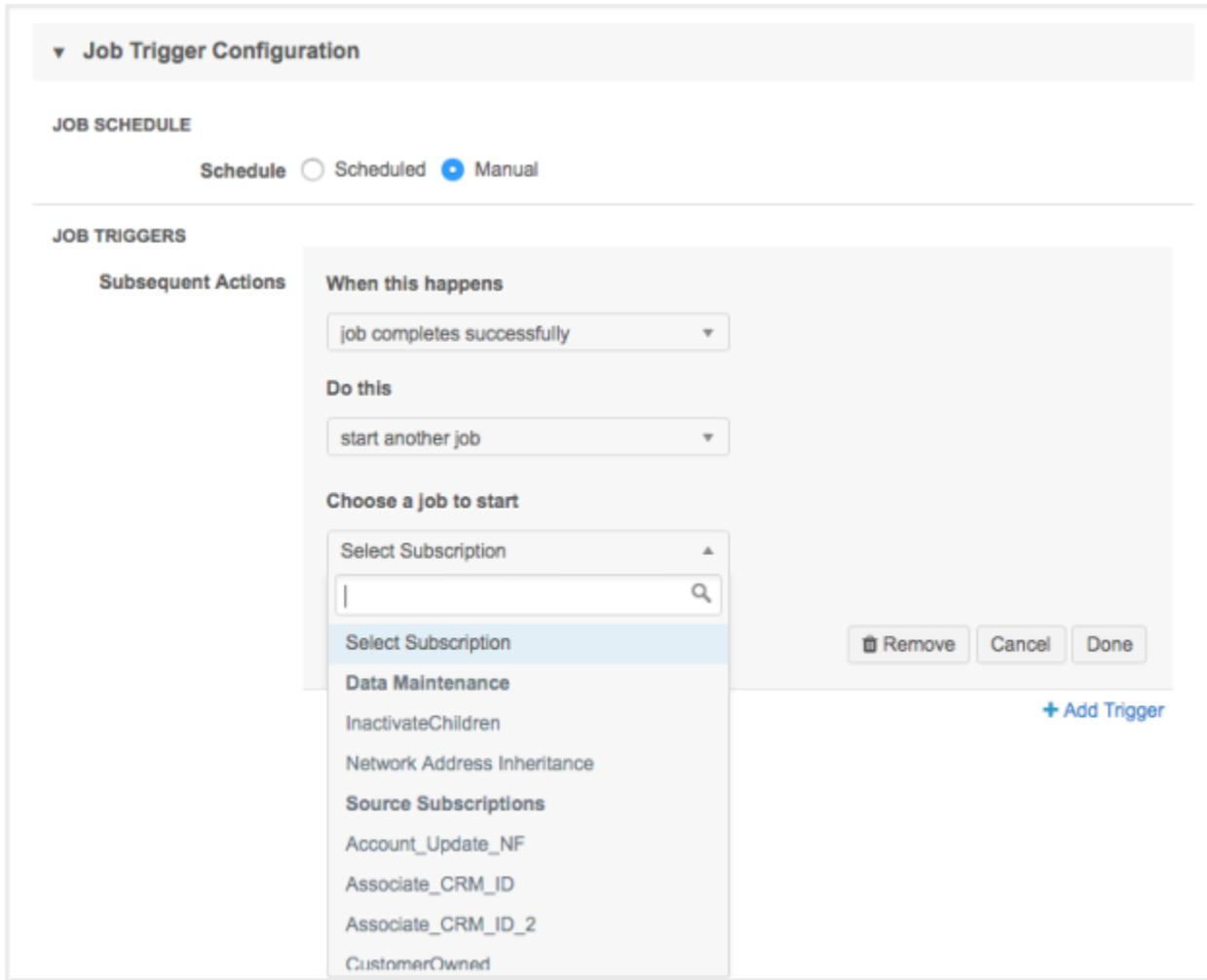
Available jobs to run

The list of jobs that can be triggered contains the enabled subscriptions in your Network instance. In the list, the jobs are grouped by the subscription type. The Data Maintenance subscription category also includes Cluster Management subscriptions and the Network Address Inheritance subscription (Refresh job).

Job triggers can be configured for any of the following subscription types:

- Source subscriptions
- Target subscriptions
- Data maintenance jobs
- OpenData subscriptions
- Network Address Inheritance refresh
- Cluster management
- US Compliance target subscription

In some cases, subscriptions that are not enabled will display; for example, a cluster management subscription. If the subscription displays and is selected, when the job runs, any updates or calculations are skipped. Similarly, Veeva OpenData subscriptions that are enabled for a country display, but if they are later disabled, they will run without downloading or updating records.

Source subscriptions with multiple input files

When a source subscription loads more than one input file, multiple independent jobs are started. For example, if a source subscription loads a file for HCPs and a file for HCOs, each file starts its own job.

Email trigger considerations

Email triggers can be configured for either of the job outcomes; job completes successfully or job is not successful. Multiple emails can be sent if the jobs for each input file meet either of the outcomes. For example, if the job for each input file fails, recipients will receive multiple emails.

Start job trigger considerations

When a source subscription has multiple input files, independent jobs for each file can be started at the same time but end at differing times. When the final job for each input file finishes, Network checks to ensure that all of the jobs for the subscription completed successfully. Each job must complete successfully to start any subsequent jobs that you've defined as a job trigger. If any of the jobs in the original subscription do not complete, the job trigger will not fire.

The job for the input file that finishes last is the one that triggers any subsequent jobs to start. The **Job History** section at the bottom of the source subscription will show which job triggered the subsequent jobs.

Job History

The **Job History** section at the bottom of the subscription contains a new column called **Job Triggers?**. It indicates if any triggers occurred after the job ran. When the job is still running, the new column will be empty.

The **Run Type** column identifies how the job was started, either **Manual**, **Scheduled**, or **By Job** (triggered from another job).

▼ Job History							1 of 34 ‹ ›
ID	DELTA TAG START	DELTA TAG END	START TIME	DURATION	RUN TYPE	OUTCOME	JOB TRIGGERS?
4882	0	934589612328321024	2019-06-04 15:33:00 IST	a minute	BY JOB	COMPLETE	Yes
4879	0	934589612328321024	2019-06-04 14:09:00 IST	a few seconds	MANUAL	COMPLETE	Yes
4874	0	934589612328321024	2019-06-04 03:00:00 IST	a few seconds	SCHEDULED	COMPLETE	Yes

Job Details

The details page for a subscription contains a new section called **Job Trigger Summary**. The section provides a summary of the job.

Job Initiation - This identifies how the job started. It could be any of the following:

- Manual
- Scheduled
- Job ID - The job ID link displays if this job was triggered by the successful completion of another job.

Jobs Triggered

If subsequent jobs were triggered by this job, the subscription name, job ID, and status of the jobs display. Click the Job ID link to navigate to that Job Details page.

Emails Triggered

If emails were triggered, the recipient list displays with a status of the email. There might be multiple email triggers and multiple emails for each trigger. Email addresses can display more than once if the same recipient is defined for multiple triggers.

Managing configurations

Job triggers are not included when you add subscriptions to export packages.

Data load

MATCH AGAINST OPENDATA

A limit has been set for the maximum number of records that can be downloaded when your source subscription uses the Match against OpenData feature. The limit ensures that customers who pay for Veeva OpenData per record do not accidentally match and download OpenData records in bulk when the source subscription runs. Now, only 5000 records can be matched and downloaded in a source subscription job. The limit is set by country because you might buy OpenData per record in some countries but you have an Enterprise Level Agreement (ELA) for other countries.

This enhancement is enabled by default for customers who buy OpenData per record in a country. This limit does not apply to ELA customers.

Downloaded records limit

The **Match & Download from OpenData** option can be configured in your source subscription. A confirmation for **Match & Download from OpenData** is now included in the message that displays when you start a job. This ensures that you understand that incoming records that are matched with records in Veeva OpenData are downloaded to your Network instance.
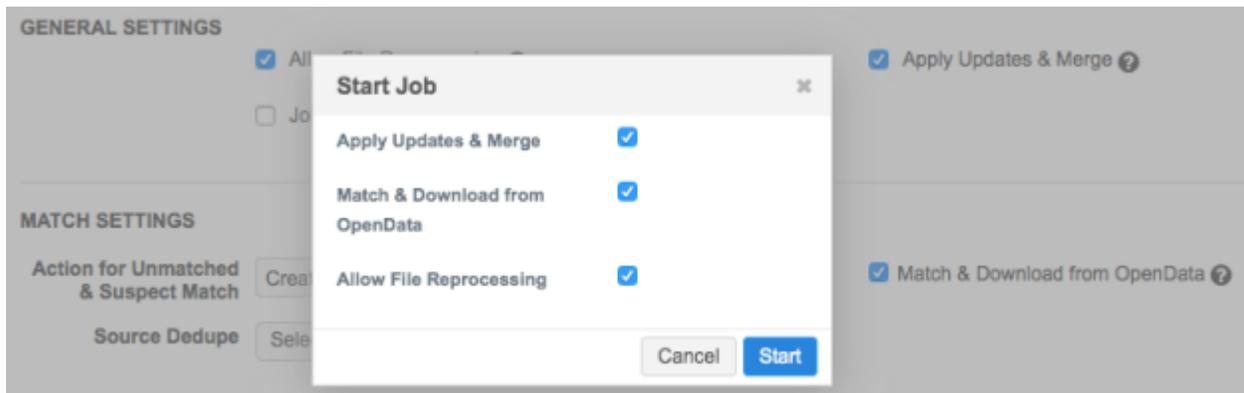
When the job runs, incoming records that are matched with records in Veeva OpenData are downloaded to your Network instance.

If you buy OpenData per record in that country and the job tries to download more than 5000 matched records, the job will fail; no records will be created or updated in your Network instance. The **Job Error Log** advises that the number of matched records exceeds the limit of records that can be downloaded for the country.

To increase the limit or discuss your subscription options, contact Veeva Support.

Reporting on downloaded records

Users with access to advanced reporting can create a query to view the number of records that were downloaded from Veeva OpenData for any job. A metric, `{object_name}.mam.downloaded`, has been added to the job_stats reporting table to support this query. Use the job ID to create your query.

Example query

```
SELECT
        *
    FROM
        job_stats
    WHERE
        job_id = '3496'
```

Merge

BULK MERGE

Bulk merge jobs no longer allow a merge if the record to be merged has either of the following record states:

- `Under_Review`
- `Deleted`

Records with these states cannot be merged into a record with any other state. The merge will not take place and a message will be provided.

This enhancement ensures that the bulk merge job rules are consistent with the suspect match rules that are applied in the Network UI.

Match

UPCOMING DEFAULT MATCH RULE UPDATES

In version 19R2.0, Network is updating the default match rules for the United States and Canada to support the address lines construction feature. Match rules that match on the `address_line_1__v` field will be updated to ensure that duplicate entities are not created after the address lines construction feature has been enabled in your Network instance.

About address lines construction

In 18R1.1, the address lines construction feature was introduced so you could standardize US and Canadian addresses to support requirements for downstream systems. After the feature is enabled, new and updated addresses are reconstructed and standardized by moving the street number, street name, and suite number into the address line 1 field. Existing local addresses in your Network instance are not updated and must be backfilled.

If `address_line_1__v` is the only address field used in the default match rules, when locally owned entities are loaded into Network without custom keys, duplicate HCPs and HCOs can be created. Network cannot match the reconstructed address line 1 fields on the incoming records with the existing local records that have the building or organization in address line 1.

The updates to the default match rules will ensure that duplicate entities are not created before you update the existing local addresses to the new format.

Updated rules

The following default match rules for the United States and Canada will be updated in 19R2.0:

- **address line 1 is the same** - HCP
- **address line 1 is the same** - HCO
- **address line 1 is similar** - HCO

The updates for the match rules are the same for all subscriptions. Only the **Threshold** (confidence level) value might vary between subscriptions.

Summary of changes

- **Included fields** - The updated rules have three fields instead of one.
- **Name change** - The rule names are changed to reflect that they previously considered just the `address_line_1__v` field but now they consider the three address line fields: `address_line_1__v`, `address_line_2__v`, and `address_line_3__v`.
- **Comparison method** - The newer rules use a 'set' collation to compare across the three fields instead of a 'direct' collation which only compares field to field.

Example match rule - Address line 1 is the same

Review the following screenshots for this match rule for HCPs (US and CA) from the Basic match UI to see how they will be updated in version 19R2.0.

Match rule (version 19R1.1)

Name *	address line 1 is the same
Fields *	address_line_1__v (Address) ✕
	☐ Compare fields from Parent HCO records
Apply filters ❶	+ Add Filter
Comparison method ❓	Direct field ▼
Null value options ❓	Do not match ▼
Success criteria	⦿ One ◯ All
Algorithms	Algorithm Jaro-Winkler ▼
	Include Winkler portion of algorithm ☐
	Names should match (HCPs in Latin languages only) ☐
	Threshold ———●— 0.86

Updated match rule (version 19R2.0)

Name *	address lines are the same
Fields *	address_line_1__v (Address) ✕ address_line_2__v (Address) ✕ address_line_3__v (Address) ✕
	☐ Compare fields from Parent HCO records
Apply filters ❶	+ Add Filter
Comparison method ❓	Sets of fields ▼
Null value options ❓	Do not match ▼
Success criteria	⦿ One ◯ All
Algorithms	Algorithm Jaro-Winkler ▼
	Include Winkler portion of algorithm ☐
	Names should match (HCPs in Latin languages only) ☐
	Threshold ———●— 0.86

Subscription updates

Subscriptions that use the default match rules for these countries will be automatically updated in your Network instance.

Features where default match rules will be automatically updated:

- Source subscriptions
- Ad hoc match
- Add requests

Each match configuration shows if you are using the default rules or if they have been overridden to benefit your specific data.

⦿ Default ❶   ◯ Override ❶

Update custom match rules

If you have modified the default match rules for any subscriptions, you can update them to reflect some or all of the changes. Network will not override any custom match rules.

To update an address match rule:

1. Navigate to any feature in the UI that uses custom match rules.
2. On the **Match Rules** tab, find the match rule that you want to change; for example, **address line 1 is the same**.
3. In the **Name** field, type a more appropriate name; for example, **address lines are the same**.
4. In the **Fields** box, add `address_line_2__v` and `address_line_3__v`.
5. Expand the **Comparison method** list and change **Direct field** to select **Sets of fields**.
6. Accept the remaining default values in the match rule:
    - **Null value options** - Neutral
    - **Success criteria** - One
    - **Algorithm** - Jaro-Winkler
    - **Threshold** - 0.7
7. Ensure that the **Enabled** checkbox is selected.
8. **Save** your changes.

Updating existing local addresses

For the detailed steps to update existing US and Canadian local addresses, see the topic called Backfilling addresses in your Network instance in the *Veeva Network Online Help*.

Data model

CLUSTER MANAGEMENT

Customers can now enrich addresses in additional countries by adding cluster codes. In this release, Network has included support for the following third party cluster provider / country combination:

- Canada - IQVIA™
- Norway - Farmastat™
- Poland - IQVIA
- Switzerland - IQVIA

A TPA must be signed with the third party cluster provider to use the cluster management feature. For more information about this feature, see the topic called Managing clusters in the *Veeva Network Online Help*.

NEW COUNTRIES SUPPORTED

A data model has been added for five new countries for Veeva OpenData:

- Bosnia and Herzegovina (BA)
- Estonia (EE)
- Montenegro (ME)
- North Macedonia (MK)
- Serbia (RS)

The reference data is based on the ZZ and EU master data models.

The following country has an existing data model, but is now an OpenData country:

- Iceland (IS)

To view the data model for these new countries, in the Admin console, click **Data Model > Network Data Model**. On the Network Data Model page, expand the **Country** list and select the country.

Localization

The languages for these six countries are translated only for reference data in the Network UI.

DATA PRIVACY OPT-OUT

These newly supported countries have been added to the list of opted-out countries in the Veeva OpenData EUMaster:

- Bosnia and Herzegovina (BA)
- Estonia (EE)
- Montenegro (ME)
- North Macedonia (MK)
- Serbia (RS)

Records that are opted-out by Veeva OpenData do not display and cannot be accessed in downstream systems. This ensures data privacy for opted-out HCPs to satisfy regional regulatory requirements.

To review the list of opted-out countries in the `data_privacy_opt_out__v` field, in the Admin console, click **Data Model > Network Data Model** and select the field.

Profile layout configuration

PREVIEWING LAYOUTS

Profile layouts can be previewed in the new profile view only. The classic profile view is now deprecated, so the option to preview the layout in the classic view is no longer available.

GEOCODING

Latitude and longitude fields are now available on the profile layouts for the countries where Network geocoding is available. Users can view the geocode fields and data on record profiles.

Profile layout updates

The latitude and longitude fields have been added to the following profile layouts:

- Australia (AU) - AU standard profile layouts for HCPs and HCOs
- Canada (CA) - NA standard profile layouts for HCPs and HCOs
- United States (US) - NA standard profile layout for HCPs and HCOs

The latitude and longitude fields have not been added to the following profile layouts:

- Italy (IT) - EU standard profile layouts for HCPs and HCOs
- France (FR) - EU standard profile layouts for HCPs and HCOs

Network geocoding is available for Italy (IT) and France (FR). However, the EU standard profile layouts for HCPs and HCOs are used for many other EU countries where geocoding is not available. As a result, the latitude and longitude fields are not populated for these countries.

To view these fields for IT and FR records, administrators can clone the EU standard profile layouts for HCPs and HCOs and add these fields to the cloned profile. For more information, see Configuring profile layouts in the *Veeva Network Online Help*.

Viewing geocode data

On record profiles, the **Extended Info** section for each address displays **Latitude** and **Longitude** fields. Geocode values are generated when an addressed is cleansed.

Users

PERMISSIONS

Changes have been made to the **Additional Permissions** section on user profiles to more accurately reflect the setting options for the new profile page. The new profile page contains preview boxes for Compliance and Data Lineage information. Previously, these features were accessed from tabs on the classic profile. The options in the **Additional Permissions** section for these features now reflect the behavior for the new profile, which became the default view for all users in version 19R1.0.

Permission	User Type	Previous Values	New Values	Description
Compliance Data	Data Steward Data Manager Standard User System Admin	Hide Tab or Display Tab	Hide Preview box on profile or Display Preview box on profile	Controls access to the Compliance preview box on the profile page. The default value is Hide Tab for new users.
Data Lineage	Data Steward Data Manager Standard User System Admin	Hide Tab or Display Tab	Hide Preview box on profile or Display Preview box on profile	Controls access to the data lineage preview box on the profile page.

Note: When administrators create new users, the permissions that display will reflect this enhancement. Existing user profiles will not be changed.

Logs

LOGIN AUDIT HISTORY

The Login Audit History page is updated to include user type details. The **User Type** column is added to help you identify log in activity for different users. Additionally, new filters have been added to the page so you can filter the table by **User Name** or **User Type**. One selection can be chosen from the **User Name** list at a time. These filters are independent, choosing a selection in one filter does not impact the other filter.

Choose time period

The option to quickly choose a time period to display entries is relocated below the date range. Also, the list now includes a **Last 3 months** option. This update is applied to all audit history pages.

TASK AUDIT HISTORY

The Task Audit History is updated to include the following enhancements that are consistent with the other audit history pages:

- 50 entries now display by default in the audit table. Previously, 20 entries displayed.
- Entries for the past day now display by default. Previously, no entries displayed.

API

VERSION UPDATE

The Network API is updated to v18.0.

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