



veeva Network

Veeva Network 19R3.0.1 Release Notes

November 2019



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About these Release Notes

These Release Notes describe all features that are included in Veeva Network 19R3.0.1.

SUBSCRIBE TO RELEASE NOTIFICATIONS

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

- **Software releases and maintenance** - Go to trust.veeva.com. At the top of the page, click **Subscribe to Veeva Trust Site** and subscribe to the Veeva Network component.
- **Release Notes and Data Governance documents** - PDF files are posted on the [Veeva Support](#) website. To be notified when new documents are published to this page, click the **Follow** button.

For more information, see [About Network Customer Master Releases](#) in the *Veeva Network Online Help*.

Browser requirements

These are the minimum browser requirements for Veeva Network:

- 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

These changes have occurred since the Early version of the Release Notes was published:

The following feature has been removed:

- **Profile layout configuration for custom objects** - For complex relationship objects, the profile layouts support adding more than one section for the object so the different relationship types can display on the profile page.

This feature will be available in a later release.

The following features have been added:

- **Security Settings** - The Network password policies have been updated to include the ability to enforce at least one lowercase character.
- **Source keys (Merge)** - Active source keys from the losing record are now retained when the winning Veeva OpenData record has a source deactivated source key.



The following topic has had significant changes:

- **Address lines construction** - Administrators can now enable the address lines construction feature for US addresses in their Network instance.

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 19R3.0 major release.

			ST	DS	DM	AD
General updates						
What's New button	A new button displays in the Network UI to direct you to the latest release documentation.	19R3.0	●	●	●	●
Home dashboard	Administrators now have access to dashboard widgets that were previously available only to data managers.	19R2.1				●
Widgets						
Labels for reference type fields	Developers can now see both the reference field and a new helper attribute that contains the translated reference label.	19R3.0		Web Developers		
Affiliation widget	Add this new widget to your web-based application to view relationships and metrics (for example, key influencers and product familiarity) among HCPs in a health care system.	19R2.1	●	●	●	●
Profiles						
Address lines construction	Administrators can now enable the address lines construction feature for US addresses in their Network instance.	19R3.0			●	●
Revision history	The preview box is updated to display the name of the source subscription instead of a code.	19R2.1	●	●	●	●
Inbox						
Filters	The available filters are enhanced so it is easier to select multiple options and see the number of filters that are applied.	19R2.1		●	●	●
Task ID	The ID in the Task ID column is now a link so you can quickly open a task in a new browser window.	19R2.1		●	●	●



			ST	DS	DM	AD
Reports						
Updated UI	The Network Reports feature is redesigned to help users find and run reports.	19R3.0	●	●	●	●
Data updater						
Quick updates to records	Administrators and data managers can quickly update records by uploading a .csv or .xlsx file.	19R3.0			●	●
Subscriptions						
Disable subscriptions	Administrators and data managers can now disable Network subscriptions.	19R3.0			●	●
Match						
Match against Veeva OpenData	Performance improvements have been made to the processing time for ad hoc match jobs and source subscriptions that are also matching against Veeva OpenData.	19R3.0			●	●
Fields supported in match UI	The match configuration (UI) now supports several fields; some that were previously supported only in advanced mode.	19R2.1			●	●
Merge						
Custom keys	Active custom keys are now retained when a record is merged with an Veeva OpenData record that has an identical custom key that is source deactivated.	19R3.0			●	●
Data export						
Exported files	Administrators and data managers can now choose to export data in individual .zip files.	19R2.1			●	●



			ST	DS	DM	AD
Data model						
Primary country	The primary_country__v field will be read-only starting in version 19R3.1.	19R3.0			●	●
Cluster management	Cluster data is now supported for Belgium, France, and Mexico for specific providers.	19R2.1			●	●
Supported countries	A data model has been added for Armenia, Azerbaijan, Georgia, Kyrgyzstan, Moldova, Tajikistan, Turkmenistan, and Uzbekistan.	19R2.1			●	●
Geocodes	A new field is added to indicate the accuracy of the generated geocodes.	19R2.1			●	●
Export the data model	New columns are added to the exported data model file.	19R2.1			●	●
Custom objects						
Dynamic access control	Administrators can now provide more granular access to custom objects by using rules that are assigned to specific users.	19R3.0			●	●
Integrations						
Network Bridge	The Network Bridge enables you to run and monitor the data subscription jobs that export data to Veeva CRM.	19R3.0			●	●
License mapping	The Network State License Mapping includes a new field to help you determine an HCP's sample eligibility.	19R3.0			●	●
Veeva Connector	Network now provides an integration pattern to communicate directly with other Veeva applications to extract or publish data.	19R2.1			●	●
Veeva CRM Integration	Network can connect to CRM to extract object data and publish the .csv files to Network's FTP server.	19R2.1			●	●
Veeva Vault Integration	Network can connect to Vault to extract object data and publish the .csv files to Network's FTP server.	19R2.1			●	●
Veeva Nitro Integration	Administrators can now publish Network data to Nitro. Previously, files had to be loaded manually into Veeva Nitro for processing on a regular basis. The process is now streamlined to reduce the number of manual steps.	19R2.1			●	●



ST DS DM AD

Security settings			
Password policies	The Network password policies have been updated to include the ability to enforce at least one lowercase character.	19R3.0	
API			
Version update	The Network API is updated to v19.0.	19R3.0	Developers
API enriched results	The Search API and Retrieve API are updated to include parameters that can display labels for reference type fields.	19R3.0	Developers
Nitro integration	The Network API is updated to support the Veeva Nitro-Network integration.	19R2.1	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.

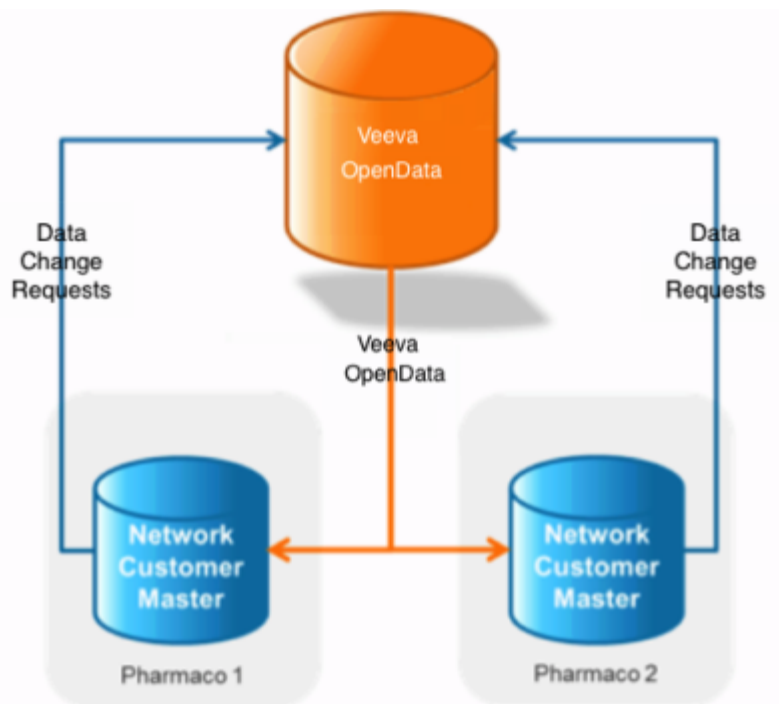


Introduction

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

Veeva OpenData provides identity, demographic, and licensure data about Health Care Professionals and Health Care 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 instance similar in concept to a Veeva CRM or Salesforce.com org).

Where Veeva OpenData is enabled, each Network instance 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 instance up-to-date and in sync with the data in Veeva OpenData.

Pharmacos can also load their own data into their Network instance 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 instance that can be shared with Veeva OpenData.

Records that do not match Veeva records will be loaded as locally managed records and updates on those records will not be shared with Veeva OpenData.

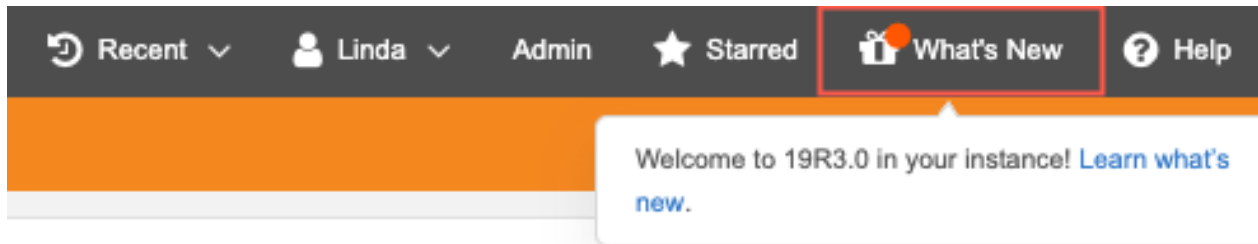


General updates

WHAT'S NEW BUTTON

A **What's New** button now displays when you log into Network at the beginning of each new release. Click the button to navigate to learn about the new features and enhancements in the release.

A red badge displays on the button to advise you that there are new features and enhancements to read about. The badge disappears after the button is clicked. When you end your Network session, the **What's New** button also disappears from the menu bar until the next release.



After the button disappears, to revisit the "What's New" topic, click the **Help** icon to access the *Veeva Network Online Help*.

HOME DASHBOARD

The Home dashboard for administrators is updated to include dashboard widgets that were previously available only to data managers. These widgets are available by default. Administrators can add them to their dashboard using the **Manage Dashboard** button on their home page.

The following dashboard widgets are now available for administrators:

- **Task Breakdown Today** - Displays all of the tasks in your local timezone.
- **DCRs Created and Processed by Hour** - Displays the number of DCRs that were created and processed in the last 24 hours.
- **Steward Productivity over Time** - Identifies the number of tasks processed by data steward for the past week.

Note: For the three dashboard widgets above, administrators must belong to inbox task groups to have access to the available data.

- **Data Quality Results** - Displays the latest results for data quality reports run in the Network instance.

For more information, see the [Home dashboard](#) topic in the *Veeva Network Online Help*.



Widgets

LABELS FOR REFERENCE TYPE FIELDS

Web developers can now add properties to the widget code that will return label values for reference type fields. Developers can use the labels to do mappings for their application instead of creating reference aliases. These properties are supported for the Search widget and the DCR widget.

When a user downloads a record in these widgets, the labels for reference type fields will be available for developers in the `select` events. Developers can retrieve the data from the JSON that is returned and use them for their Network integration.

New properties

Add the following properties to the widget code:

- `enriched-results="true"` - This will display labels in the JSON that is returned for the `select` event.
- `enriched-results-language="en"` - The language that you want the labels to display; for example, `en` (English)

Example code

```
<veeva-network-search-widget
  widget-name="ServiceCloud"
  auth-domain="verteo.veevanetwork.com"
  widget-id="NTE0Ozs7c2Vydm1jZWNSb3VkX19j"
  enriched-results="true"
  enriched-results-language="en">
</veeva-network-search-widget>
```

AFFILIATION WIDGET

Use Network's new widget to quickly understand influencers between HCPs and identify key players in a health care system. For example, sales representatives, home office users, and key account managers can use the affiliation data to understand the main influencers at a hospital so they know who to target in a product's pre-commercial stage.

Business users can access this real-time Network data in their own application without logging into Network. Affiliations can be displayed in an influence map to quickly visualize metrics like influence or product familiarity, or they can be displayed in a table to understand how HCPs are affiliated and their influence on each other. Individual profiles can be opened and explored for more information. Records are restricted to a user's data visibility profile.



Availability

The affiliation widget is available for early adopters; it is not available by default. To discuss becoming an early adopter, contact your Veeva representative.

How it works

Network's affiliation widget is supported for web-based internal applications; for example, intranets or platforms like Salesforce™.

Applications must meet the following requirements:

- The application is web-based.
- Your Network instance uses single sign-on (SSO) authentication (every user must have a Network/SSO account).

Adding the affiliation widget to your internal application has two steps:

1. **Configure the widget** - Network administrators set up the widget in their Network instance. When the configuration is saved, code snippets are automatically generated.
2. **Embed the widget** - Web developers embed the generated code snippets into the internal application.

When steps 1 and 2 are complete, the affiliation widget is fully functional for business users to search for and view affiliations in Network from their internal application.



Affiliation widget scenario

In this example scenario, the affiliation widget has been embedded into Salesforce. A business user is exploring the affiliation widget to look for key targets inside a health care system.

Example

The user opens the affiliation widget. By default, he sees the health care systems that he has recently opened. He can search for a health care system or choose one of the recent systems.



When the health care system opens, the **Influence Map** displays by default. The canvas enables users to understand and visualize the different relationships between the HCPs and HCOs.

The sales rep can use the **Influence Map** to understand HCPs who have the most product familiarity or who has the highest level of disease expertise. He clicks **Influence** in the **Show Ratings** box to see the most influential people connected to a specific HCP.



From the **Influence Map**, the sales rep can do any of the following activities:

- Explore different ratings using the **Show Ratings** filters.
- Click **Table View** to explore key targets inside the health care system.
- Select an HCP or HCO to view the record profile for more information.
- Modify the metric values (Low, High, Very High, and so on) for any HCP.
- Explore the HCPs affiliated to a specific HCP
- Update any of the ratings for a HCP from the profile view or the **Table View**. The updates are automatically processed and reflected in real-time.

The sales rep clicks on an HCP to open the record profile and explore the HCPs affiliations.



The screenshot displays the Memorial Health Care System interface. At the top, there's a navigation bar with 'Memorial Health Care System' and a 'GO BACK' button. Below this, there are tabs for 'Influence Map' and 'Table View'. The main area is divided into two sections. On the left, there's a 'Show Ratings' section with radio buttons for 'None', 'Disease Expertise', 'Influence' (selected), 'Product Familiarity', and 'Scientific Positioning'. Below that is a 'Filter by Rating' section with color-coded buttons for 'Very High', 'High', 'Neutral', 'Low', and 'Very Low'. The central part of the screen shows a network diagram with nodes representing individuals and organizations, connected by lines. Nodes include 'Lorry Lorek', 'Memorial Oncology Center', 'Gloriana Cleynaert', 'Lyndy Auguste', 'Evan Witherden', 'Daphne Sagerson', 'Memorial Health Care System', 'Patsy Nelson', 'Dennis Littlek', 'Memorial Satellite Center', 'Jedd Rawood', and 'Mady Verni'. On the right, there's a detailed profile for 'Daphne Sagerson, Prescriber'. It includes a 'View Details for 5 Affiliated HCPs' button, a rating filter (currently set to 'Low'), and a 'Primary Information' section with fields for Name, HCP Type, Status, Gender, AMA Do Not Contact?, PDRP Opt Out?, and Associated with Kaiser?. Below that is an 'Addresses' section stating 'No active Addresses available.'

This is just one integration scenario that's available using the affiliation widget.

Affiliation object

To support the affiliation widget, Network can now store HCP to HCP affiliations. The affiliation object is available for early adopters of the affiliation widget.

More information

To learn more about the affiliation widget and affiliation object, contact your Veeva representative.

Profiles

ADDRESS LINES CONSTRUCTION

US addresses can be reconstructed to ensure that they support downstream systems by containing the street number, street name, and suite number (if applicable) in the Address Line 1 field.

The US OpenData team will begin updating US addresses in batches to leverage the address lines reconstruction feature starting after version 19R3.0. Customers with both locally managed US records and OpenData US records should consider enabling this feature so all US addresses are standardized consistently.



Administrators can now enable this feature for locally managed US addresses in their Network instance. Go to **Settings > General Settings** and enable the **Address Lines Construction** option.

When the feature is enabled, locally managed addresses are reconstructed whenever they go through the address cleansing process.




For more information about this change and its relationship with custom match rules, see the [Address lines construction](#) topic in the *Veeva Network Online Help*.

REVISION HISTORY

The **Revision History** preview box on the profile page is updated to display the name of any source systems created by administrators; for example, **concur_system**. Previously, the system description displayed instead of the system name; for example, **Update from Concur**.


This enhancement ensures that the information in the **Data Sources** preview box and the **Revision History** preview box are aligned.

REVISION HISTORY

-  **Update from change_request**
2019-07-18 IST
-  **Update from VCRM**
2019-06-29 IST
- 6 revisions
-  **Add from GIMS**
2015-03-25 GMT

[More Details](#)

DATA SOURCES

-  **3 data sources**
 GIMS
 VCRM
 change_request

[More Details](#)



Inbox

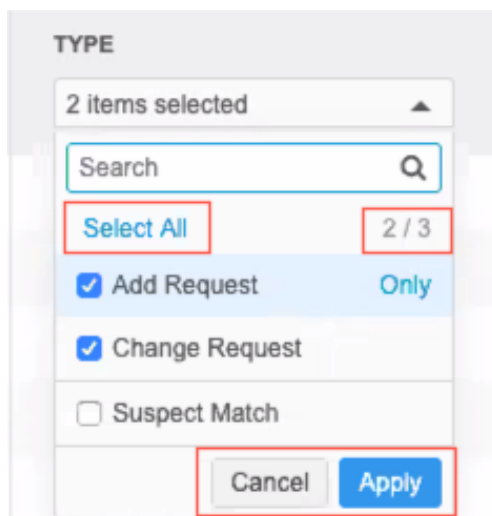
FILTERS

The inbox filter behavior is enhanced so you can easily select multiple options and see the number of filters that are applied.

These enhancements are enabled by default in all Network instances.

Column filters

Columns that contain multiple filter selections (for example, **Type** and **Assignee** columns) are standardized to ensure the behavior is consistent.



The following updates have been made to each multi-select column filter in the inbox:

- **Filter selections are no longer automatically applied.**

Each list contains **Apply** and **Cancel** buttons that you can click when your selections are complete. Previously, filters were immediately applied so it could be difficult to select more than one filter.

Clicking another part of the inbox, outside of the column list, also applies your filter selections to the inbox. Note that if you click outside of the list to navigate away from the inbox, your selections are not applied.

- **Selected values are identified by a count.**

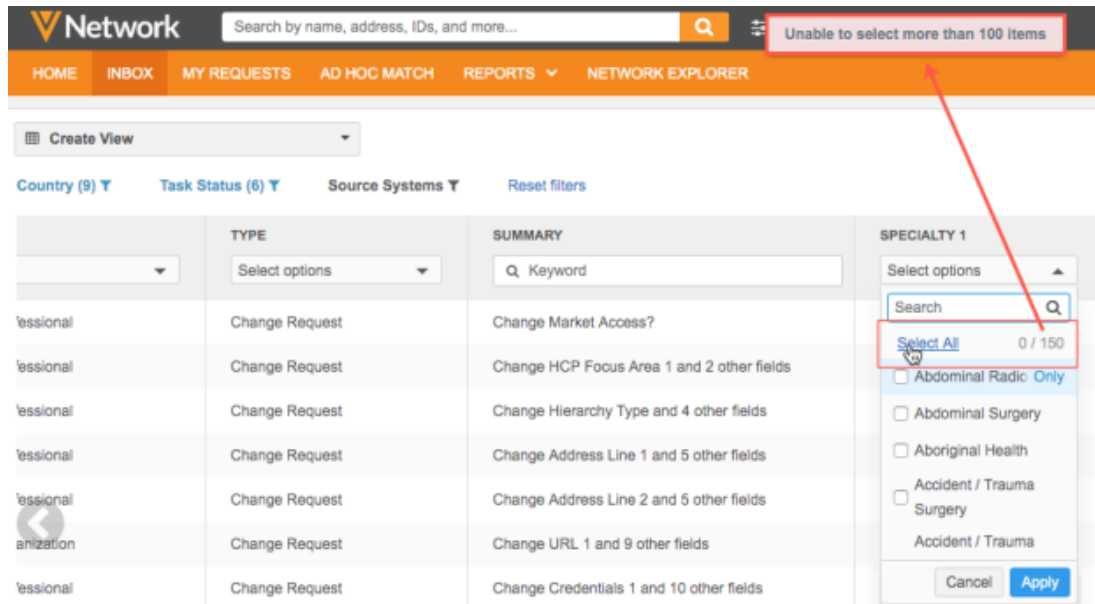
A count of your selections displays at the top of the list. A count of the total available values also displays below the search field.

- **All values can be selected at once.**

Each column list now contains a **Select All** option. A limit of 100 values can be selected. A message displays to advise that the limit was exceeded.



If you click **Select All** and the limit is exceeded, the list reverts to the previous selections. For example, if you had two values previously selected, the list reverts to select those two values again.

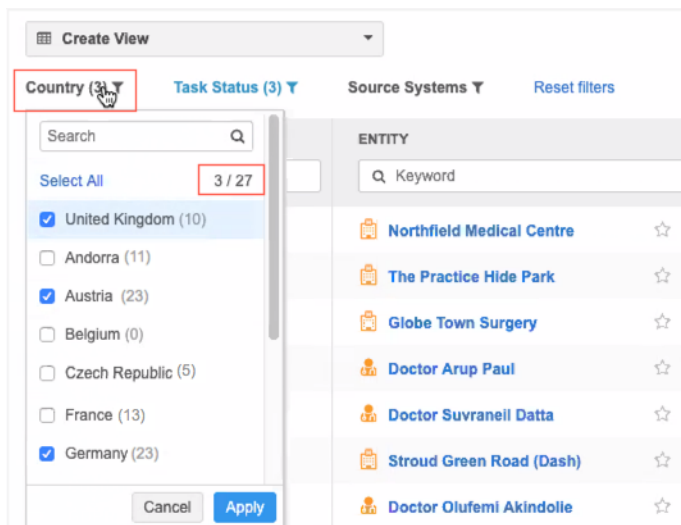


All multi-select columns that you add to your inbox are updated with these enhancements.

Main filters

The column filter enhancements are also applied to the main filters that display at the top of the inbox: **Country**, **Task Status**, and **Source System**.

In addition to the column filter enhancements, updates were also made to the main filters. As you make selections, a count now displays beside the main filter name. When you apply your selections, the color of the filter name, icon, and the selection count changes from black to blue. This is a quick way for you to see that you have filters applied.





TASK ID COLUMN

The task IDs are now a link so you can quickly open the request. Right-click the link to open the data change request in another browser tab.

TASK ID	ENTITY	ENTITY TYPE	TYPE
935064690820972959	Northfield Medical Centre	Health Care Organization	Change Request
935064675321315743	Tom Ford	Health Care Professional	Add Request
935064669316514207	Globe Town Surgery	Health Care Organization	Change Request
935064662080684447	Doctor Arup Paul	Health Care Professional	Change Request

Reports

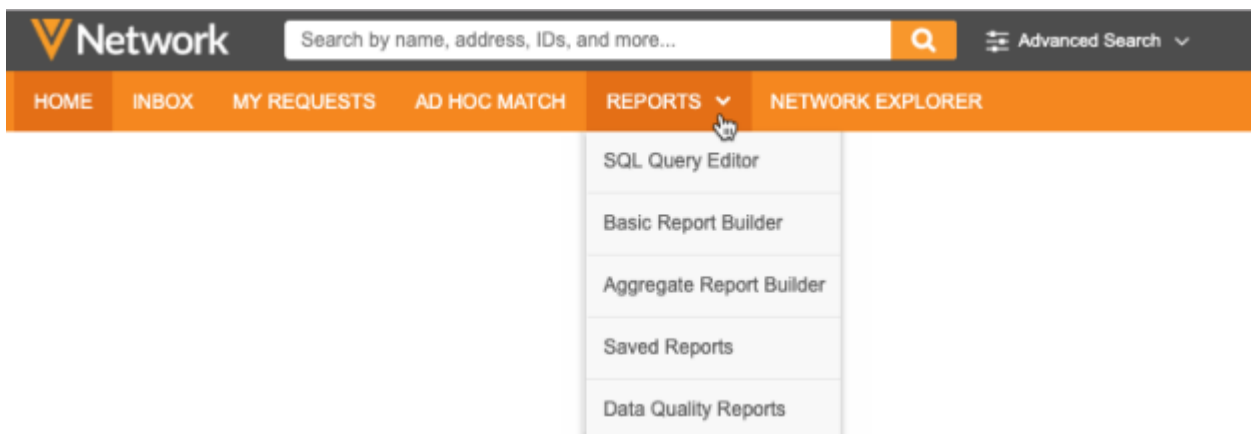
NETWORK REPORTS UPDATES

The Network Reports feature has new navigation options and an updated user interface for some pages to help you find and run reports.

These enhancements are enabled by default in all Network instances.

Navigation changes

On the Network main menu, the Reports feature is updated with new navigation so you can more easily discover and choose the reports options.



Previously, the different types of ad hoc queries were grouped in the **Ad Hoc Queries** menu item; now, they are surfaced on the Reports menu so you can quickly access them.



Previous Navigation	New Navigation	Description
All Reports	Saved Reports	Predefined reports that provide various statistics for data. All users can create, run, edit, and copy reports.
Quality Reports	Data Quality Reports	Reports that specifically highlight issues with data quality.
Ad Hoc Queries > Record Details tab	Basic Report Builder	The standard method of creating an ad hoc query using controls to select entities, apply filters and sort criteria. All users can use this report builder.
Ad Hoc Queries > Counts & Summaries tab	Aggregate Report Builder	Quantify data based on the criteria and filters. Results can be displayed in a chart.
Ad Hoc Queries > Advanced tab	SQL Query Editor	Create a report using a template or write a SQL query

Reporting database timestamps

Updates for the reporting database display on the Basic Report Builder, Aggregate Report Builder, and SQL Query Editor pages. The **Last Updated** timestamp is changed to a more readable format. The **Next Update** timestamp has been removed to avoid confusion; the timestamp could be misleading especially when there were no updates to export.

Basic Report Builder

Reporting Database Last Updated: October 22, 2019 - 13:40 EDT

SQL Query Editor updates

This page, previously the **Ad Hoc Queries > Advanced** tab, is redesigned so you can more easily discover the available options for creating your query.

SQL Query Editor

Reporting Database Last Updated: October 23, 2019 - 15:40 EDT

Save Query
Run Query

Sample Queries
My Recent Queries

Query Helper: Tables Fields Reference Codes Keywords Operators Format Query

```

1 SELECT
2     hco.vid__v,
3     hco.corporate_name__v,
4     hco.major_class_of_trade__v,
5     hco.hco_type__v,
6     hco.hco_status__v,
7     hco.created_date__v,
8     hco.modified_date__v,
9     hco.primary_country__v,
10    hco.is_veeva_master__v,
11    address.entity_type__v,
12    address.formatted_address__v,
13    address.address_line_1__v,
14    address.locality__v,
15    address.administrative_area__v.
                
```

Include only VALID and UNDER_REVIEW records in results. ⓘ



The key changes for this page are listed below.

Sample Queries

The buttons at the top of the page provide a starting point for your query.

Click the **Sample Queries** button to open a list of query templates. You can click **Preview Query** to view any of the report queries in a readable format. When you select a query, it is added to the query box where your mouse cursor is positioned. It will not override any query text already written in the query box.

Sample Queries [x]

Search sample queries [Q]

▼ Address (4)

- Basic Address Query
Retrieve the basic fields of an address
Preview Query
- Group by Region
Number of addresses within the same country, state, city and postal code
Hide Query
- HCO Address Query
All addresses with HCO information
Preview Query

```
SELECT
  country__v,
  administrative_area__v,
  locality__v,
  postal_code__v,
  COUNT (*)
FROM
  address
GROUP BY
  country__v,
  administrative_area__v,
  locality__v,
  postal_code__v
```

[Cancel] [Insert Selected Query]

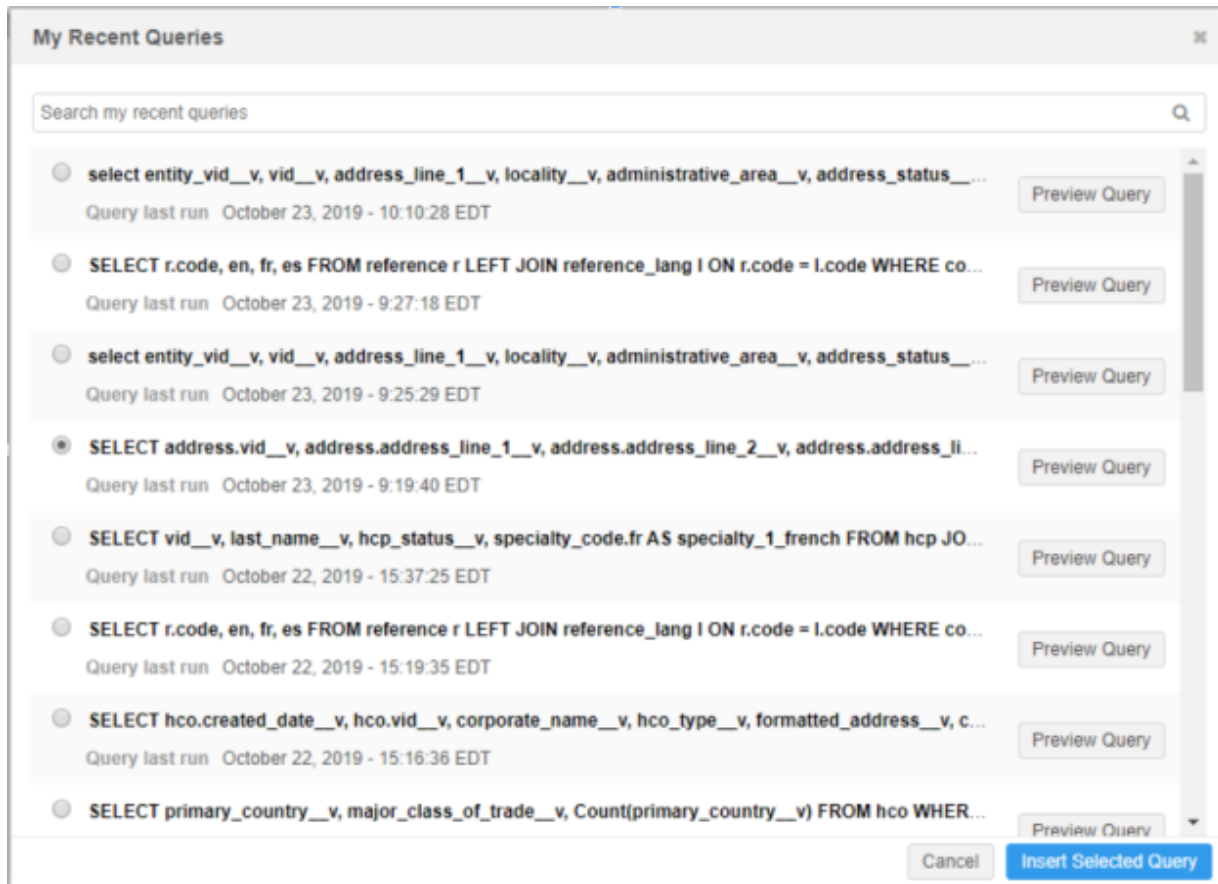
Sample queries were previously available as a link in the SQL query box.



My Recent Queries

Click this button to find a query that you have previously run. This is a new option that contains the last 50 queries that you have run from the SQL Query Editor page in this Network instance. The dialog displays the time that the query ran last.

The list doesn't include queries that you have run from other report pages, scheduled reports, or reports that have been run by other users.



As always, you can begin typing your query directly into the SQL query box instead of using these options.

Query helpers

The header of the query box contains several options to help you to build your query. Click each icon to open a list of available tables, fields, reference codes, keywords, and operators. Previously, these options displayed as icons at the bottom of the query box.

Excluding records

At the bottom of the query box, select **Include only VALID and UNDER_REVIEW records in results** to exclude all other record states. This option is enabled by default. Previously, the option was called **Record State**.

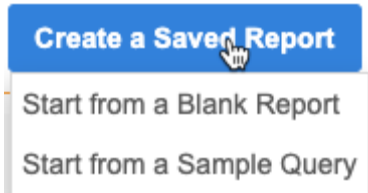


Saved Reports

The Saved Reports page was previously called **All Reports**. The function of the page is unchanged, but improvements have been made to the UI to make it easier for you to create a new report. The key change on this page is how a new report can be created.

Create new reports

On the Saved Reports page, click **Create a Saved Report**. Previously this button was called **Add Report**.



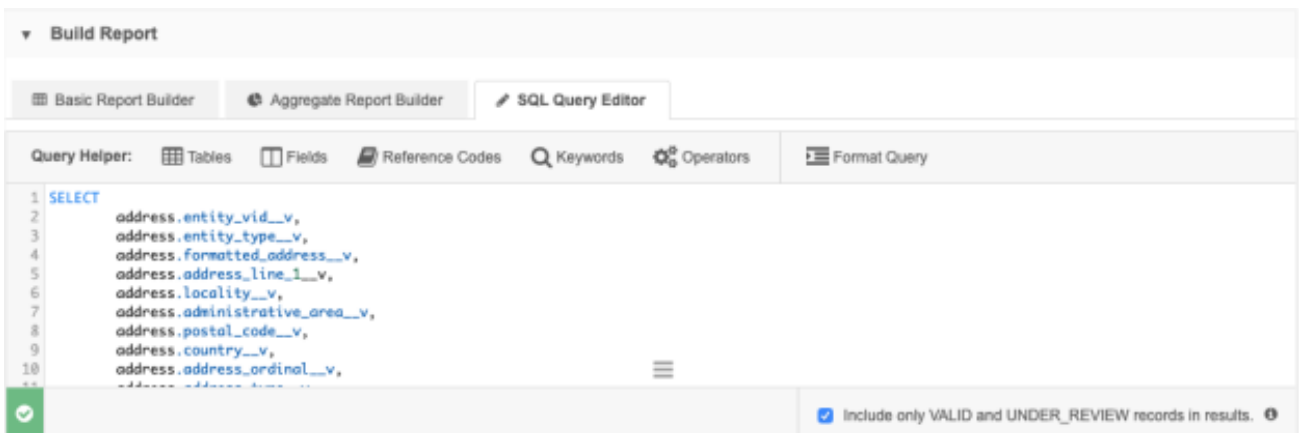
When you click the button, two options display:

- **Start from a Blank Report** - Create a report. In the **Build Report** section, you can choose how you want to create the query: **Basic Report Builder**, **Aggregate Report Builder**, or **SQL Query Editor**.

If you choose the **SQL Query Editor** in the custom report, you must type the SQL query in the query box; **Sample Queries** and **My Recent Queries** are not available on this page.

- **Start from a Sample Query** - Choose a sample query. In the **Sample Queries** dialog, you can click **Preview Query** to view the SQL for any of the sample queries in the list. The sample query is inserted in the query box on the **SQL Query Editor** tab.

You still have the option to use the **Basic Report Builder** and **Aggregate Report Builder** by clicking on those tabs.





Data updater

QUICK UPDATES TO RECORDS

Administrators and data managers can use this new feature to quickly make simple updates to records using .csv files and Microsoft Excel (.xlsx) files. For example, you might want to update primary addresses or deactivate records. Data update jobs are ad hoc jobs; they cannot be scheduled.

This feature is available by default in your Network instance.

Data updater benefits

- Users can update records without needing the Network training that the robust source subscriptions feature requires.
- Parent objects are not required. For example, to update an address, provide the Network entity ID (VID) for the address only; you do not need to upload the HCP that is associated with the address.
- Microsoft Excel® and .csv file are supported. Microsoft Excel files must be .xlsx files only.
- Files that you upload can be stored locally. Users do not need access to your FTP server.
- Data is scanned to ensure it is valid before records are updated.

Data supported for updates

Before you create a file to update the records in your Network instance, review the records and fields supported by the Data Updater.

- **Record state** - Only records that have a VALID record state can be updated.
- **Fields** - The following fields are not supported for update:
 - system fields (`created_date__v`, `record_state__v`, and so on)
 - alternate keys
 - read-only fields
 - custom key fields
 - `entity_vid__v`
- **Field ownership** - Custom fields can be updated on OpenData or third party master records. Updates to OpenData or third party managed fields will not be processed on OpenData records or third party records.

Create a file

To update the records in your Network instance, create a .csv or Microsoft Excel (.xlsx) file that includes the Network entity ID of the record and the fields that you want to update. Each file should contain updates for individual objects; for example, create one file for HCPs and one file for licenses.



File requirements

The following requirements must be met so the file upload does not fail:

- **File data** - The file must include at least two columns:
 - **vid__v** - The Network entity ID of the object.
 - **A field to update** - One or more fields that you want to update on the records. This could be a Veeva field (__v) or a custom field (__c).
- **Format** - The file format must be either .csv or .xlsx.

If you are uploading a Microsoft Excel (.xlsx) file, ensure that the cells in the VID field column are defined as a text; otherwise, the VIDs might be trimmed in the file.

- **Size** - A maximum of 200,000 records can be included in the file.
- **Delimiter** - A comma must be used to separate items in a column.

Example file - Addresses

The primary address field is being updated for the addresses specified by their Network entity IDs (VIDs). Note that the VIDs for the owning objects (HCPs or HCOs) is not required.

	A	B	C
1	vid__v	primary_address__c	
2	260905142193226754	Y	
3	260905142268724234	Y	
4	260905142268724238	null__v	
5	260905142335833088	Y	
6	260905142637822976	Y	
7	260905142688154633	Y	
8	260905142713320454	Y	
9	260905142713320458	Y	
10	260905142721709059	Y	

Support for null values

The Data Updater supports updating fields to have a null value. In your file, add null__v to the column. After the job runs, the field value will be cleared on the specified record.

Upload the file

Add a file to update the records in your Network instance.

1. On the Network menu bar, click **Data Updater**.
This tab displays for administrators and data managers only.
2. Click **Update Records**.



Update Records Cancel

Make changes to records; for example, update primary addresses or custom fields, or inactivate records.

1 Upload File
2 File Summary
3 Update Records

Select Object ▼
Health Care Professionals (HCPs)

Source System ▼
Demo

Does your file contain third party data?
(Example: data licensed from IMS/QVIA) ● No
○ Yes

File Upload Required Column Headers: vid__v

[See Example](#)

Drag CSV or Excel file here

or

Upload File

3. On the **Upload File** tab, the following details are required:

- **Select Object** - Expand the list and choose the object type that you are updating. Only Veeva standard objects display; custom objects are not supported.
- **Source System** - Select the system that applies to these updates. Third party, proprietary, and restricted systems do not display in the list.

The system is used for source rankings. Ensure that this system is the highest source in your source ranking so you can override the existing field value. The system is also used in the Revision History to note the updates to the record.

Source aliases are also supported; they are extracted from the system that you select.

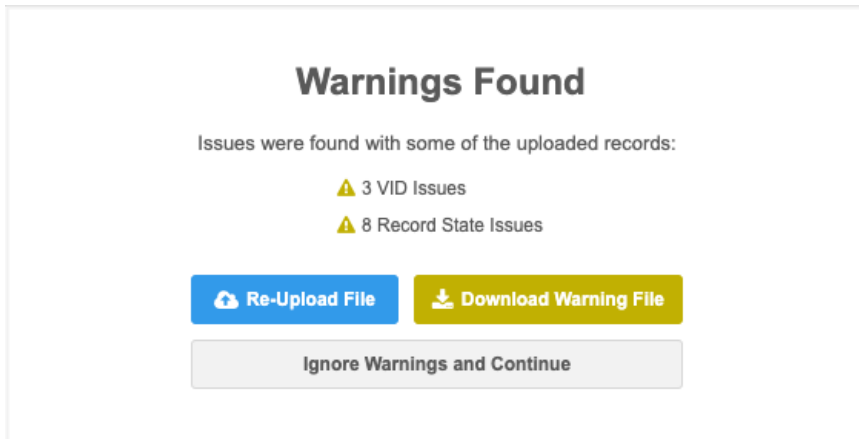
- **Third party data** - Indicate if the file that you are uploading contains third party data. If you choose **Yes**, confirm that you have a third party agreement (TPA) in place so Veeva can receive the data.
- **File Upload** - Drag your file into the box or click **Upload File** to choose a file.

For example, we can upload this file to update HCP records.

HCP-test										
	A	B	C	D	E	F	G	H	I	J
1	vid__v	send_to_crm__c	is_target__c	segment__c	Account Owner	Territory	lastname__v	ID	verteo_id__c	record_state__v
2	260904949162968067	Y	Y	A__c	Melanie Davis	14021	Smith	41	VERT-123	VALID
3	260904949850833925	N	Y	B__c	Thomas Chabot	52491		22	VERT-521	VALID
4	260904974068745216		N	A__c	William Charles	21021		13	VERT-888	VALID
5	260904974949549056	Y	Y	A__c	Mary Smith			4		VALID
6	260904975494808579	Y	Y					5		VALID
7	260904975738078208	Y	Y					6		VALID



When the file is added, it is scanned to validate the data. If there are any issues with the file, a message displays.



Possible issues:

- **Missing VID field** - the vid__v column is missing from your file. (Error)
- **No Field to Update** - There is no other field included in your file. This can also occur if you have selected the incorrect Object for the file. (Error)
- **Invalid VID Fields** - A Network entity ID (VID) is not correct. (Error)
- **Record State issues** - The record state is not supported for update. Only VALID record states are supported for these jobs. (Warning)
- **Data Type issues** - The value does not match the type of reference field; for example, there is text in an integer field. (Warning)

A count for each issue is provided.

Download the error or warning file to identify the records with issues. The file downloads as a Microsoft Excel file. The file can contain a maximum of 250,000 errors. If the limit is reached, errors will stop being written to the file.

HCP_vid-errors

vid__v	Category	Type	Details
2609049754948085	VID Issue	ERROR	vid__v 2609049754948085 does not exist for HCP
2609049804356986	VID Issue	ERROR	vid__v 2609049804356986 does not exist for HCP
2609049827677317	VID Issue	ERROR	vid__v 2609049827677317 does not exist for HCP

Fix the issues and upload the file again. If the file contains warnings only, you can download the file and fix the warnings, or ignore the warnings and upload the file.

The upload will fail if at least half of the records have issues; otherwise, the file will be uploaded.



Review the file summary

When the file is uploaded, you can view a summary of the data before you commit the changes to Network.

1. Review the details on the File Summary page.

A count for the following details display at the top of the summary:

- **Records read** - The total number of rows included in the file for the specified object.
- **Fields Recognized** - The number of valid fields included in your file.
- **Fields Unrecognized** - A count of fields that are not known. Fields are not recognized because the column header is not a field in the Network data model or the field is not associated with the specified object.
- **Fields Ignored** - A count of fields that were ignored. Fields are ignored because they are not supported for update; for example, read-only fields, alternate keys, system fields, custom key fields (other than status), and the `entity_vid__v` fields (ownership of sub-objects cannot be changed).

The details for these counts display in the table below. For reference, the first three columns for each of the fields display.

File Summary (HCP-test.xlsx) Cancel Job [Update Records](#)

1 Upload File
2 File Summary
3 Update Records

40 HEALTH CARE PROFESSIONALS (HCPs)
RECORDS READ

4 FIELDS
RECOGNIZED

4 UNRECOGNIZED
FIELDS

2 FIELDS
IGNORED

FIELD	STATUS	FIRST ROW VALUE	SECOND ROW VALUE	THIRD ROW VALUE
Network Entity ID (vid__v)	✓ Valid VID Field	260904949162968067	260904949850833925	260904974068745216
Send to CRM (send_to_crm__c)	✓ Field Recognized	Y	N	
Is Target? (is_target__c)	✓ Field Recognized	Y	Y	N
Segment (segment__c)	✓ Field Recognized	A__c	B__c	A__c
Account Owner	⊗ Unrecognized Field	Melanie Davis	Thomas Chabot	William Charles
Territory	⊗ Unrecognized Field	14021	52491	21021
lastname_v	⊗ Unrecognized Field	Smith		
ID	⊗ Unrecognized Field	41	22	13
Record State (record_state__v)	⊗ Field Ignored - System fields cannot be updated	VALID	VALID	VALID
Verteo ID (vertco_id__c)	⊗ Field Ignored - Verteo ID cannot be updated	VERT-123	VERT-521	VERT-888

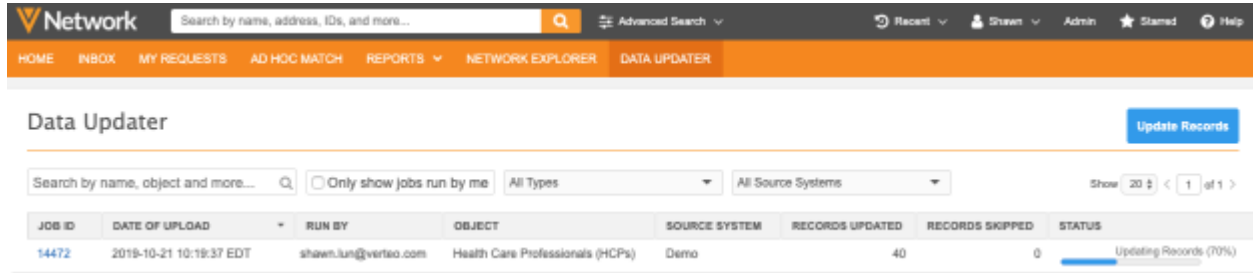
Note: If any address fields are updated, a warning message displays in the **Status** column to advise that address cleansing might occur because of the updates.

2. To commit your changes, click **Update Records**. In the **Confirm Record Updates** dialog, you can add details to the **Job Notes** box. This can be helpful to provide context about the updates and will display on the Job Details page after the Data Updater job runs.
3. Click **Yes, Update Records**.



Update records

When you commit your updates, the Data Updater page opens and a message displays to notify you that the job is started. The **Status** column displays the progress of the job.



On the Data Updater page, data managers can see the jobs that they have run; administrators can see all of the jobs run by any user in the Network instance. Filter the list of jobs by object type or source system.

Click the link in the **Job ID** column to open the Job Details page.

Job details

The Job Details page provides a summary of the data updater job.



Job Details (ID: 14472)

Job Results

40

HCP RECORDS UPDATED

Job Overview

Job ID 14472

Status ✔ Completed

Start Time 2019-10-21 10:19:00 EDT

Duration a minute

Run By dharsan@verteo.vdmdev.com

Operation ↻ Update Record

Object Updated Health Care Professionals (HCPs)

Source System Demo

Job Notes Updates to several HCP fields for Veeva CRM accounts.

File Summary

FILE DETAILS

[HCP-test.xlsx](#)
FILE UPLOADED

Health Care Professionals (HCPs)
OBJECT UPDATED

40 RECORDS READ

✔ **4** FIELDS RECOGNIZED

? **4** UNRECOGNIZED FIELDS

✖ **2** FIELDS IGNORED

FIELD	STATUS
Network Entity ID (vid__v)	✔ Valid VID Field
Send to CRM (send_to_crm__c)	✔ Field Recognized
Is Target? (is_target__c)	✔ Field Recognized
Segment (segment__c)	✔ Field Recognized
Account Owner	? Unrecognized Field
Territory	? Unrecognized Field
lastname_v	? Unrecognized Field
ID	? Unrecognized Field
Record State (record_state__v)	✖ Field Ignored - System fields cannot be updated
Verteo ID (verteo_id__c)	✖ Field Ignored - Verteo ID cannot be updated

Job Error Log

EXTERNAL ID	STAGE	RULE	MESSAGE
0	Dry Merge Stage		An unknown reference code <D__c> for the attribute <segment__c> of type <Segmentation... more
0	Dry Merge Stage		An unknown reference code <D__c> for the attribute <segment__c> of type <Segmentation... more



Job Results

This section provides an overview of the records that were updated.

The following counts can display:

- **Records updated** - The number of records that were updated for the selected object.
- **Other affected objects** - A count of records that were updated that were not the selected objects.
- **Records Skipped** - A count of records that were not updated. Click **Download Skipped Records** to view the issues.

Job Overview

This section displays the job information, including any job notes that you provided.

File Summary

Review the file details, selected object, and fields that were included in the file. A link to download the original file is available if the file is located on the FTP server.

Job Error Log

This section displays if the job included any errors.

Reporting

Data updater job statistics are available in Network reports.

Subscriptions

DISABLE SUBSCRIPTIONS

Administrators and data managers can now disable subscriptions in their Network instance. Previously, subscriptions could not be disabled. This enhancement gives administrators more control for managing their subscriptions; for example, subscriptions that are no longer used, or that are seldom used, can be disabled so they no longer display on the subscription list page.

When a subscription is disabled, the following behavior occurs:

- Scheduled jobs do not run (in the Network UI or the API).
- Job triggers that are set for this subscription do not run.
- New job triggers cannot be added for the disabled subscription.
- The subscription is removed from the list on its subscription list page.

Subscriptions can be enabled again after they have been disabled. When a disabled subscription is enabled again, any schedules or job triggers on the subscription will be active again; schedules will run at the set time and jobs will be triggered when the conditions are met.

This feature is enabled by default in your Network instance.



Supported subscriptions

The following types of subscriptions can be disabled:

- source subscriptions
- target subscriptions
- data maintenance subscriptions

Disable a subscription

Subscriptions can be enabled or disabled in two ways:

- **Subscription list page** - Click the icon in the **Status** column.

NAME ▲	DATA SOURCE	SCHEDULE	LAST JOB TIME	LAST JOB STATUS	STATUS
Account_Update_NF	3rd_Party_System (3rd_Party_System)	Manual			✔
Associate_CRM_ID		Manual			✔
Associate_CRM_ID_2	VCRM-DemoTT	Manual	2019-04-09 15:49:00 IST	COMPLETE	✘
CustomerOwned	Customer_Owned	Manual	2017-03-25 12:45:00 GMT	COMPLETE	✔

- **Subscription configuration page** - Choose an option beside the **Status** heading.

Monthly_Account_Update Details Advanced Mode Clone Start Job Cancel Save

▼ Details

Name:

System:

Code:

Description:

Status: Enabled Disabled

⚠ Disabled subscriptions will not run until you enable them.

The subscription status is **Enabled** by default for new subscriptions.

When you save your changes, a confirmation dialog displays. If job triggers are associated with the subscription, a reminder that they will not run also displays.



Manage disabled subscriptions

After a subscription is disabled, it no longer displays in the list on the main subscription page; only **Enabled** subscriptions display by default. The **Show Disabled Subscriptions** checkbox displays a count if there are any disabled subscriptions. Click the checkbox to add disabled subscriptions back to the list.

The screenshot shows the 'Target Subscriptions' page. At the top, there is a search bar with the text 'Search subscriptions' and a magnifying glass icon. To the right of the search bar is a checkbox labeled 'Show Disabled Subscriptions (1)'. Further right is a blue button labeled 'Add Subscription'. Below these elements is a table with the following columns: NAME, DATA SOURCE, TYPE, SCHEDULE, LAST JOB TIME, LAST JOB STATUS, and STATUS. The table contains four rows of subscription data.

NAME ^	DATA SOURCE	TYPE	SCHEDULE	LAST JOB TIME	LAST JOB STATUS	STATUS
HCPs	Alias	Data	Manual			✓
NetworkBridge	VCRM-DemoTT	Data	Manual	2017-05-19 04:00:00 IST	COMPLETE	✓
test	CRM	Data	Manual			✓
test10	Alias	Data	Manual		COMPLETE	✓

Your choice for this checkbox is unique on each subscription type page. Network remembers your choice when you navigate to other pages or when you log out of the UI.

If **Show Disabled Subscriptions** is not selected, disabled subscriptions cannot be found using search.

Match

MATCH AGAINST VEEVA OPENDATA

Users that run ad hoc match jobs and source subscription jobs that also match against Veeva OpenData will see noticeable improvements in the processing time for their jobs.

MATCH RULES

The following fields are now available to use when you are creating or editing data groups and match rules using the basic match UI.

- address_status__v
- hco_status__v
- hcp_status__v
- license_status__v
- parent_hco_status__v

Previously, the address_status__v and parent_hco_status__v fields were available only in the advanced match UI.

This enhancement is enabled by default in all Network instances.



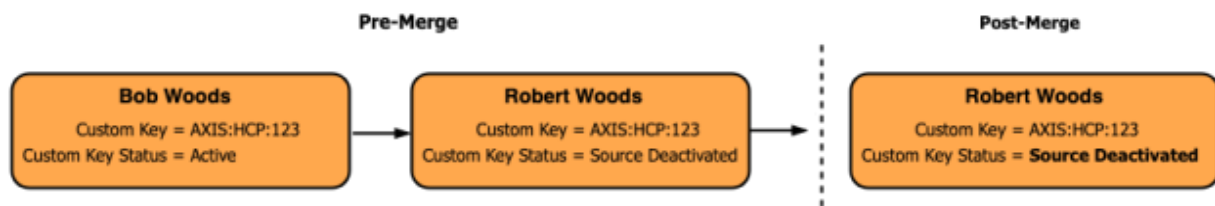
Merge

Active custom keys are now retained when a record is merged with an Veeva OpenData record that has an identical custom key that is source deactivated. Previously, in this situation, the active key on the losing record was not included on the winning record.

This enhancement is enabled by default.

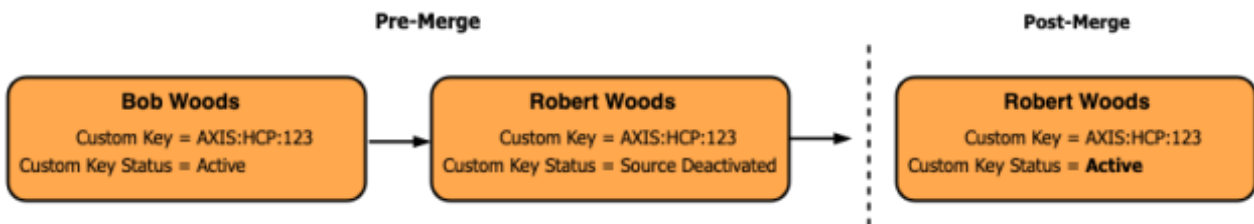
Example

Previous behavior



The source deactivated custom key remains on the winning record after the merge.

New behavior



Now, the active custom key from the losing record is copied over to the winning record to ensure that the winning record has an active key.

This is the same merge behavior that occurs when locally managed records are merged.

Data export

EXPORTED FILES

Administrators and data managers can now choose to export Network data in individual .zip files. Previously, data could only be exported in one .zip file which contained all of the .csv files. Now, a .zip file for each object can be created.

The setting is available in all target subscriptions, but it is disabled by default.

To enable the setting for your target subscription, in the **File Format** section, choose **Zip Files Individually**.



FILE FORMAT

Format CSV Encoding UTF-8

Delimiter | Include header row?

Text Qualifier " **Zip Files Individually? ⓘ**

Include Name and Time in Filename

FTP Path Default Custom

Note: This option should not be set for target subscriptions used by the CRM Bridge.

Job details

On the Job Details page, the **Overview** section displays the selection for the **Zip Files Individually** option.

Job Details (ID: 7) Cancel Job

▼ Overview

System	VCRM	Subscription	59763
Start Time	2019-08-29 15:07:00 EDT	Job ID	7
Duration	a few seconds	Percent Complete	100.00%
Current Stage	FinalStage	Outcome	COMPLETE
Type	Data	Started By	System
Full Data Extract	Yes	Delta Tag Start	0
Delta Tag End	935083137034125311	Level of Hierarchy Exported	1
		Zip Files Individually?	Yes

The **FTP Path** also indicates if the files were zipped individually; it provides the sub-directory that contains the files instead of the individual .zip file.

Example path format:

```
/outbound/<system>/<target subscription name>/<sub directory with archive files>
```



Data model

PRIMARY COUNTRY

The `primary_country__v` field for HCP and HCO objects will be read-only starting in version 19R3.1.

The primary country is defined when a record is created. Previously, the field was editable. If the primary country of a record is changed, problems can occur when the record is later updated or exported to downstream systems because the reference values will be out of sync. Reference data is managed by country so, if you change a record's primary country the existing reference values might be incorrect. Changing the primary country can also cause users to unexpectedly lose access to records because of their data visibility profile permissions.

This update will impact the following features:

- **Profile page** - The field will be read-only. A lock icon will display.
- **Data load** - Changes to the primary country will be skipped but other updates will be processed as usual. A job warning displays in the **Job Error Log** on the Job Details page. The message will include the record's Network entity ID (VID) or the custom key so administrators or data managers can identify the problematic record.
- **Network API** - Changes for the `primary_country__v` field will be denied. The response will display a Failure message for the field.

This enhancement is planned for version 19R3.1.

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:

- Belgium - IQVIA™
- France - IQVIA
- Mexico - IQVIA

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

Cluster code support for Belgium

For Belgium, IQVIA offers two types of cluster codes:

- Customized Doctor Groups (CDG) - Codes are mapped at the HCP level and are only available for HCPs.
- General cluster code structure - Codes are mapped at the address level using postal codes.

Network supports the general cluster codes structure for Belgium only; CDG cluster codes are not supported.



NEW COUNTRIES SUPPORTED

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

- Armenia (AM)
- Azerbaijan (AZ)
- Georgia (GE)
- Kyrgyzstan (KG)
- Moldova (MD)
- Tajikistan (TJ)
- Turkmenistan (TM)
- Uzbekistan (UZ)

Reference data

The reference data is a union between the reference codes enabled for Other Countries (ZZ) and the reference codes enabled for Russia (RU).

Data model

The data model for these countries is a union between the Other Countries (ZZ) and Russian (RU) data models.

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

English is used for the Network UI and the data model for these countries. Russian is used for the reference data.

GEOCODES

A geocode accuracy field is now available in the Network data model. The field can be used to understand the quality of the geocodes that are returned by Network's third party address cleansing service. For example, you can use the GeoAccuracy code to troubleshoot inaccurate cluster calculations.

Enable the field

The `geo_accuracy_code__v` field is enabled by default in new Network instances. The field is not enabled by default in existing Network instances to prevent mapping issues in downstream systems. Administrators can enable the field.

The field is available for all countries but data is populated only for countries where geocoding is supported: Australia, Canada, France, Italy, and the United States. The field is populated (along with the latitude and longitude fields) when an address is cleansed. Address cleansing occurs when addresses are added or updated in your Network instance.



The geocode accuracy field can be added to profile layouts; it is not added by default.

GeoAccuracy codes

GeoAccuracy codes contain two values:

- status - P (Point), I (Interpolated), A (Average), U (Unable to geocode)
- level - 5 (Delivery Point), 4 (Premise), 3 (Thoroughfare), 2 (Locality), 1 (AdministrativeArea), 0 (None)

For more information about the values and their meaning, see the documentation from the address cleansing service: <https://support.loqate.com/documentation/reportcodes/geoaccuracy-code/>.

Examples

A GeoAccuracy code could be one of the following values:

- **P4** - A single geocode matched the address using the premise.
- **A2** - Multiple geocodes matched the address using the locality. An average was used to generate the result.

EXPORTED DATA MODEL

Columns have been added to the file that can be exported from the data model. The columns have been added to the data model for Veeva standard objects and custom objects so both exports contain the same columns. The columns provide additional information about the data model fields.

The following columns have been added to the exported file.

Column Name	Possible Values	Description
Effective Version	Version number	The first time the field was created for at least one country.
Reference Type	Reference type	If the field does not have a reference type, the column is empty.
Default Value	True/False	True if the field has a default value in at least one OpenData country
HCP Opt Out Behavior	Retain, Blank, Mask	<p>Indicates what happens to the field value when the record is exported if the <code>data_privacy_opt_out</code> field is set to Yes/True.</p> <ul style="list-style-type: none"> • <code>data_privacy_opt_out__v</code> - the opt out behavior occurs when the record is exported from OpenData to your Network instance. • <code>data_privacy_opt_out__c</code> - the opt out behavior occurs when the record is exported from your Network instance to downstream systems. <p>Mask means that the field value is replaced with "Data Privacy" when the record is exported.</p>



Column Name	Possible Values	Description
Default Rankings	Default/Overridden	Identifies if the field rankings have been overridden.
Read Only in (region)	True/False	The value is determined per country. If the field is not available in a country, the column value is always False.
Required in (region)	True/False	The value is determined per country. If the field is not available in a country, the column value is always False.

Example export

The highlighted columns have been added to the exported data model.

Field Name	Localized UI Label	Initial Version Added	Status	Type	Reference Type	Length	Default Value	Custom Field?	Network System Field?	Field Description	HCP Opt-Out Behaviour	Default Rankings	CRM Field Group Name	Available in Androm (AD)	Read Only in Androm (AD)	Required in Androm (AD)
academic_title_v	Academic Title	1.0.0	Active	Reference	HCPAcademicTitle	100	False	False	False	Academic Title	Blank	Default		False	False	False
addresses_v	Set of Addresses	1.0.0	Active	Set			False	False	False	Set of addresses for the Record	Blank	Default		True	False	False
adel_v	ADELI ID	19R2.0	Deactivated	String		20	False	False	False	ADELI ID. The identifier for HCPs in France.	Blank	Default		False	False	False
alternate_first_name_v	Alternate First Name	19R1.0	Deactivated	String		200	False	False	False	Alternate First Name of the HCP.	Blank	Default		True	False	False
alternate_last_name_v	Alternate Last Name	19R1.0	Deactivated	String		200	False	False	False	Alternate Last Name of the HCP.	Blank	Default		True	False	False
alternate_middle_name_v	Alternate Middle Name	19R1.0	Deactivated	String		200	False	False	False	Alternate Middle Name of the HCP.	Blank	Default		False	False	False
ama_do_not_contact_v	AMA Do Not Contact?	1.0.0	Active	Reference	BookerReference	20	False	False	False	AMA Do Not Contact?	Blank	Default		False	False	False
ams_id_v	AMS ID	1.5.3	Deactivated	String		10	False	False	False	ID of the record in AMS	Blank	Default		False	False	False

Export the data model

To export the data model, click **Export** at the top of the Network Data Model or the Custom Objects Data Model in the Admin console.

Custom objects

DYNAMIC ACCESS CONTROL

This new permission feature allows administrators to provide more granular access to individual custom objects by using rules that are assigned to specific users. When dynamic access control is enabled on a custom object, access to that object is permitted only through the rules to the defined users. Users must also have access to the object through their data visibility profiles.

This feature is available for custom objects that are enabled in your Network instance. Dynamic access control can be disabled on the custom object after it has been enabled.

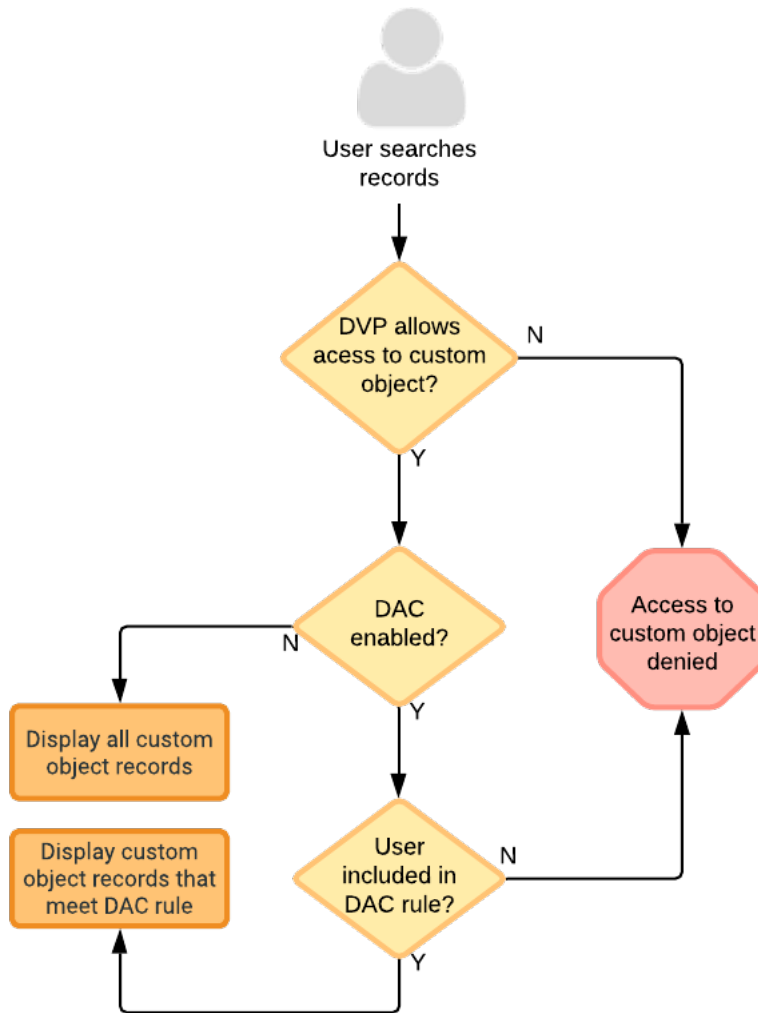
How it works

Dynamic access control works with data visibility profiles (DVPs) to provide access to individual custom objects.

When dynamic access control is enabled for a custom object, no user can access the object until rules are created and assigned to user groups or individual users. If the rule conditions are met and users have access to the custom object through their data visibility profile, they will have access to the custom object records that meet the rule criteria. For custom objects, DVP access is either all access or no access.



When dynamic access control is not enabled, permissions to access to custom objects is defined only through a user's data visibility profile permissions. This is the existing behavior that has always determined access to custom objects.



When dynamic access control is enabled, users must belong to a rule and have data visibility permissions to access the custom object.

Users with access to the restricted custom object can do the following:

- Search for records
- View the records on the profile page
- View record relationships from Network Explorer
- View data change requests (DCRs)
- See the records in their inbox
- Retrieve record information using ad hoc queries (reporting)
- Access records using the Network API

All other users will have no access to the custom object.

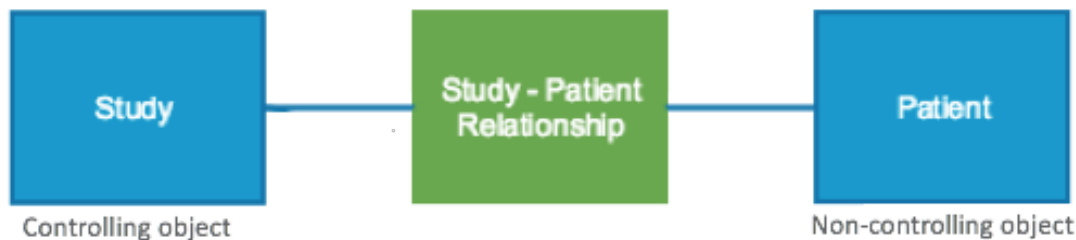


Access to restricted custom objects through custom relationship objects

Before enabling dynamic access control on a custom object, consider the object's relationship to other objects. On the Profile page, relationships to custom objects will be hidden for users that don't have access. However, custom object data could be exposed to unauthorized users through the relationship object on the Revision History or Data Lineage pages if dynamic access control is enabled on a non-controlling object.

Examples

Review the examples for the Study and Patient custom objects to understand how you can restrict relationship data.



Example 1 – Dynamic access control is enabled on the controlling object

In this scenario, you have access to Patient records. Dynamic access control is enabled on the Study custom object (controlling object) and you do not have access to Study records. In this case, when you are viewing Patient records, you cannot see any relationships to Study records.

Example 2 – Dynamic access control is enabled on the non-controlling object

In the opposite scenario, dynamic access control is enabled on the Patient custom object (non-controlling object). You do not have access to Patient records, but you have access Study records. In this case, when you are viewing the Revision History and Data Lineage for a Study record, you will be able to see Patient record information because relationship data is governed by the controlling object (Study).

To prevent users from being able to view restricted record data, consider using dynamic access control on the controlling object.

Enable dynamic access control

Dynamic access control can be applied to enabled custom objects only. Custom sub-objects and relationship objects inherit the permissions assigned to the related object.

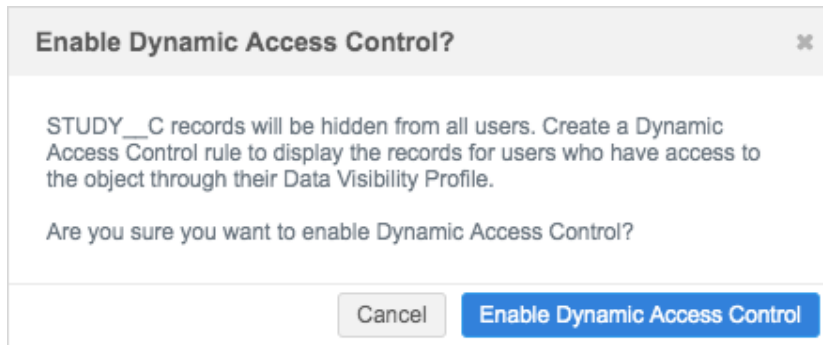
To enable dynamic access control for a custom object:

1. In the Admin console, click **Data Model** and choose the data domain for the custom object.
2. Select the custom object from the list.
3. In the **Dynamic Access Control** section, click **Enable Dynamic Access Control Rules**.

This section is dimmed if the custom object is not enabled.



- In the dialog box, click **Enable Dynamic Access Control**.



After dynamic access control is enabled, no users have access to the custom object until you create rules and add users or user groups.

Create user groups

Dynamic access control rules can be applied to user groups or individual users. Creating user groups can simplify your user permission assignments. For example, if you have several users that require access to the same data for a project or assignment, create a group for these users. When the project ends, you can remove the user group instead of all of the individual users.

You can add user groups to a rule after the rule is created, or you can create user groups first so you can add them when you are creating the rule.

To create a user group:

- In the Admin console, click **Users > User Groups**.

This tab is only available if at least one custom object is enabled in your Network instance.

- Click **New User Group**.
- In the **Details** section, add a **Name** and **Description**.
- The **Status** is **Active** by default.

The user group can be changed to **Inactive** so that any rules using the group no longer provide access to the custom object.

- In the **Users** section, click **Add Users**.
- In the dialog box, click the **Add** icon to choose the user. Only active Network users display in the list.
- When you have finished adding users, click **Update Users**.

The user group is created and can be applied to a dynamic access control rule.



Dynamic access control summary

A summary of all dynamic access control rules in your Network instance is available in the Admin console (**Users > Dynamic Access Control**). This tab displays if custom objects are enabled in your Network instance.

The summary page lists any rules that have been defined for custom objects.

The following actions are available on this page:

- Create a new rule. Only custom objects that have dynamic access control enabled will be available for the new rule.
- Edit an existing rule.

RULE NAME	OBJECT	DESCRIPTION	STATUS
General Patients	PATIENT__C	General Patients	Active
High Profile	PATIENT__C	High Profile Patient	Active

Displaying 1 to 2 of 2

Define rules

Dynamic access control rules can be created in two places in the Network UI:

- Dynamic Access Control summary page (**Users > Dynamic Access Control**) - Create rules for any enabled custom object.
- Custom object's configuration page (**Data Model > Data Domain**) - Create rules in the **Dynamic Access Control** section of the page. The rules are applied to the custom object that you're configuring.

To create a rule:

1. From the Dynamic Access Control page or the custom object configuration page, click **Create New Rule**.
2. In the **Details** sections, add a **Name** and **Description**.
3. Choose the **Object Type**. Only custom objects that have dynamic access control are available in the list.

If you are creating the rule from the custom object's configuration page, the rule is applied to that object by default.

4. Beside the **Status** heading, choose **Active**.
5. In the **Rule Criteria** section, choose to include or exclude specific records.

Click **+ Add Field** and choose the **Field**, **Condition**, and **Value** criteria for the rule.



Example

Create a rule for the STUDY custom object to provide access to the records for a specific country.

Only active fields for the custom object (including fields on the related sub-objects and relationship objects) are available in the list.

If a field is disabled after it has been used in a dynamic access control rule, the rule is skipped if no records meet the rule criteria. The rule can still apply if a record in your Network instance meets the rule criteria; Network considers the field values not the state of the field.

6. In the **User Groups** section, click **Add User Groups**. Choose any groups that you want to give access to the custom object.

If you haven't yet created user groups, go to **Users > User Groups** to create a group.

7. In the **Users** section, click **Add Users**. Click the **Add** icon to choose the users that will have access to the custom object. Only active Network users display in the list. The **Add** icon becomes a **Green Check Mark** icon for selected users. When you are finished, click **Update Users**.

The **Users** table displays the user type, security policy and data visibility profiles assigned to the user. You can click the user name link to navigate to the user's profile for more information or to make changes.

Note: If multiple rules are assigned to the same user, access to the custom object is cumulative. In these cases, access is always granted to the object; access is not restricted.

8. Save your changes.

The rule is active and can now begin providing access to the object.

Example rule

This dynamic access control rule provides access to STUDY__C records for Canada to the users and user groups defined in the rule. Users must also have permission to the custom object through their data visibility profiles.



Rule Criteria

Include Records Exclude Records

FIELD	CONDITION	VALUE	
Study	Primary Country	Equals	Canada AND

[+ Add Field](#)

User Groups

Search selected user groups ... [Add User Groups](#)

GROUP NAME	DESCRIPTION	USERS	STATUS
Clinical trials - Canada	Users with access to Canadian clinical trials	1	Active

Displaying 1 to 1 of 1 Show 10 1 of 1

Users

Search selected users ... [Add Users](#)

NAME	USERNAME	TYPE	SECURITY POLICY	PROFILE	INBOX TASK GROUPS	STATUS
Admin, Bob	bob.admin@verteo.com	System Admin	Classic	US Data	Data Loading Jobs	Active

Considerations for user access

There are some Network features where users will see the object data masked or a locked profile page if they don't have access to the custom object.

- **My Requests** - Users that do not have access to a custom object can still create an add request for the object. After the data change request is sent, their My Requests page displays the request but the record cannot be accessed. Clicking the request displays the locked page.
- **Inbox** - Data stewards that do not have access to a custom object can view tasks in their inbox if they belong to an inbox task group that has access to the custom object. The data in **Entity** column is masked with "Inadequate Access Permission". Clicking the task opens the locked page.

Values in columns are not populated for restricted objects.

Network Search by name, address, IDs, and more...

HOME INBOX MY REQUESTS AD HOC MATCH REPORTS NETWORK EXPLORER

Country Task Status Source Systems Reset Filters Enter task id View Sort by Time

TASK ID	ENTITY	TYPE	SUMMARY	ASSIG...	SERVICE TIME
935038032012968351	Jacqueline Hollywood	Change Request	Change Network ID of the...	1 Item select	144 hours
935038146326299039	Inadequate Access Permission	Add Request	Study		144 hours
935039463123648927	Inadequate Access Permission	Change Request	Change High Profile		138 hours
935039489236795607	Inadequate Access Permission	Change Request	Change High Profile		138 hours
935039490825781663	Inadequate Access Permission	Change Request	Change High Profile		138 hours

Displaying 1 to 5 of 5 (0 Selected) Show 10 1 of 1

To prevent these tasks from displaying for these data stewards, consider creating an inbox task group specifically for users with access to the custom object.



- **Reports** - Users that do not have access to custom objects can run reports that include the custom object but the report results will not return records that the user does not have access to through dynamic access control.
- **Recent items** - If users previously had access to a custom object and their permissions changed, the Recent list still contains the record name but the record cannot be accessed. Clicking the recent item displays the locked page.

User profiles

Sections for Dynamic Access Control and User Groups have been added to the use profile page. This enables administrators to quickly see the custom objects users have access to and the user groups that the user belongs to.

Dynamic Access Control			
RULE NAME	OBJECT	DESCRIPTION	STATUS
High Profile Patients	PATIENT__C	High Profile Patients	Active

User Groups		
GROUP NAME	DESCRIPTION	STATUS
High Profile	High Profile	Active

These sections display only if you have custom objects enabled in your Network instance.

Network Explorer

If users do not have access to a custom object, Network Explorer hides the relationships to objects; they do not display on the canvas.

Target subscriptions

To prevent restricted custom objects from being exported to downstream systems, administrators can filter the custom object in the target subscription.

In the **File & Field Selection** section, ensure that **Do Not Export** is selected for any restricted custom objects that should not be included in the export.

File & Field Selection			
Health Care Organization	Export All Fields	Health Care Professional	Export All Fields
Study	Do Not Export	Patient	Do Not Export
Address	Export All Fields	Condition	Do Not Export



Logs

The System Audit History tracks any changes to dynamic access control configurations.

Network API

If the Network integration user does not have access to records through dynamic access control, the following behavior occurs:

- **Search API** - Restricted records are not returned.
- **Retrieve DCR API** - Data change request details are masked with "Inadequate Access Permission".

Sample Retrieve DCR response

```
{
  "responseStatus": "SUCCESS",
  "change_requests": [
    {
      "change_request_id": "935039860349272479",
      "status__v": "CHANGE_PROCESSED",
      "result__v": "CHANGE_ACCEPTED",
      "entity_type": "PATIENT_C",
      "vid_key": "Network:Entity:935038590152671615",
      "vid__v": "935038590152671615",
      "metadata": {
        "creator": "jessie.steward@verteodev.vdmdev.com",
        "note": "",
        "source": "Entity Profile Editor",
        "system": null
      },
      "resolution_notes": [
        {
          "comment": "System approved - Created by data steward.",
          "fields": [
            "address_line_1__v",
            "address_status__v",
            "address_type__v",
            "administrative_area__v",
            "country__v",
            "locality__v",
            "address_line_3__v",
            "address_line_2__v",
            "postal_code__v"
          ],
          "created_date": "2019-08-22T02:47:22.116Z",
          "code": "A-00011"
        }
      ],
      "entity": {
        "addresses__v": [
          {
            "vid_key": null,
            "vid__v": "935039860390494592",
            "object_id": "935039860307657120",
            "address_line_1__v": {
              "change_requested": "Inadequate Access Permission",
              "final_value": null,

```



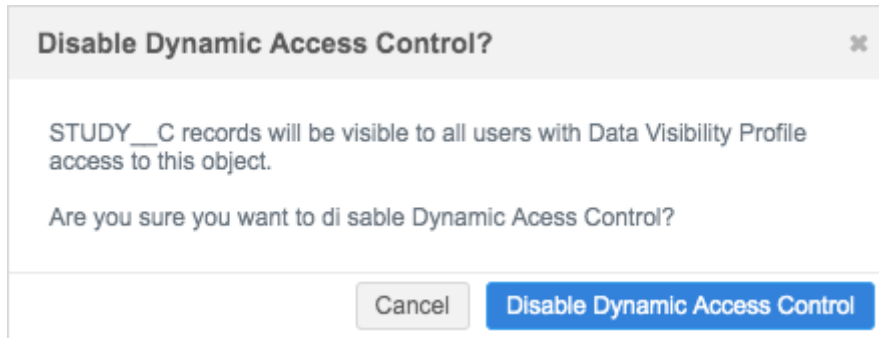
```

        "result": null
    },
    "address_status_v": {
        "change_requested": "Inadequate Access Permission",
        "final_value": null,
        "result": null
    },
    "address_type_v": {
        "change_requested": "Inadequate Access Permission",
        "final_value": null,
        "result": null
    },
    "administrative_area_v": {
        "change_requested": "Inadequate Access Permission",
        "final_value": null,
        "result": null
    },
    "country_v": {
        "change_requested": "Inadequate Access Permission",
        "final_value": null,
        "result": null
    },
    "locality_v": {
        "change_requested": "Inadequate Access Permission",
        "final_value": null,
        "result": null
    },
    "address_line_3_v": {
        "change_requested": "Inadequate Access Permission",
        "final_value": null,
        "result": null
    },
    "address_line_2_v": {
        "change_requested": "Inadequate Access Permission",
        "final_value": null,
        "result": null
    },
    "postal_code_v": {
        "change_requested": "Inadequate Access Permission",
        "final_value": null,
        "result": null
    }
    }
    ]
},
"created_date": "2019-08-22T02:47:22.000Z",
"completed_date": "2019-08-22T02:47:23.000Z",
"taskCountry": "US",
"task_type": "CHANGE_REQUEST",
"original_task_type": "CHANGE_REQUEST",
"parent_task_ids": [],
"reserved_vid": null
}
]
}

```

Disable dynamic access control

If you disable access control, the custom object becomes visible to all users that have access to the object through their data visibility profiles.



All active rules on the custom object will be disabled. Administrators cannot create new rules for the custom object from the Dynamic Access Control summary page (**Users > Dynamic Access Control**).

Network integrations

NETWORK BRIDGE

Using the Network bridge, you can now run and monitor the data subscription jobs that export data from Network to Veeva CRM within Network. Previously, these jobs were run from Veeva CRM using the Network Subscription Process. The Network bridge integrates the CRM account mappings so the target subscription files are transformed into Veeva CRM format. Veeva CRM accounts will be updated with the data from Network; for example, accounts will be merged or deactivated, and addresses can be updated with license data (DEA, SLN, CDS, ASSMCA, OhioTDDD).

The Network bridge has been in production for early adopters since version 18R1.0.

This feature is enabled by default for new Network instances. The Network bridge can be enabled by request for existing instances; manual migration steps are required.

Note: The previous version of the CRM bridge that uses the CRM Data Subscription will be sunset in Veeva CRM version 20R3.

Benefits

Network fields are mapped to CRM accounts so that the data is integrated as soon as the subscription job completes. Depending on the **Network Settings** that are configured in Veeva CRM, the following actions can be taken during a subscription job:

- Delete sub-object account records if they are inactive in Network.
- Deactivate HCOs, HCPs, and addresses in CRM based on their inactive status in Network.
- Populate the address sync fields in CRM if the Network Address Inheritance feature is enabled
- Merge or deactivate CRM accounts if they are merged or inactive in Network.
- Update CRM addresses with the following license data from Network: DEA, SLN, CDS, ASSMCA, Ohio TDDD.
- Filter the ParentHCO records that are included in the subscription job based on the value for the **Filter Allowed Relationship Types** option in the **Network Settings** in Veeva CRM.



- Process and load state licenses quickly in batches.
- Enhanced Inactive Record Sync
 - Update all mapped fields for records inactivated during the Network Bridge process.
 - This requires the CRM setting `FILTER_INACTIVE_RECORDS_vod` to be enabled with a value of `1`. For more information about the CRM setting and sync options, see the topic called "[Handling Inactive Network Records](#)" in the *Veeva CRM Online Help*.
- Trigger other jobs to run when the Network bridge job completes, or trigger the Network Bridge subscription to run when other jobs (for example, source subscriptions) complete.

Network - CRM configuration

Before the Network bridge can be used, the integration between Network and CRM must be complete.

For more information, see the topics in the *Veeva CRM Online Help*:

https://crmhelp.veeva.com/doc/Content/CRM_topics/Integration/Network_Integration/Introduction_and_Background.htm.

Salesforce credentials

Salesforce™ credentials are required for the Network bridge. Administrators can store these credentials in their Network instance. This enables administrators to easily maintain the credentials by adding them to Network one time so they can reference the information whenever it's needed.

To store a Salesforce credential in Network:

1. In the Admin console, click **Settings > External Credentials**.
2. On the External Credentials page, click **Add Credentials**.
3. In the **New External Credential** dialog, select **Salesforce** from the list. Click **OK**.

External Credentials > New External Credential

New External Credential

Cancel Save

Type Salesforce

Name Verteo CRM US

Username jennifer.stevens@verteo.com

Password

Security Token (Optional)

URL

- https://login.salesforce.com
- ✓ https://test.salesforce.com

Test Connection



4. On the New External Credential page, provide the following information:
 - a. **Name** - Type a name for the credential. For example, *Verteo CRM US* (for a US CRM Bridge environment). Names must be unique.
 - b. **Username** - The CRM integration user ID required for the bridge configuration.
 - c. **Password** - The password for the CRM integration user.
5. In the **URL** list, choose one of the following URLs for the Salesforce domain:
 - `https://login.salesforce.com` - Use for production instances.
 - `https://test.salesforce.com` - Use for test instances.
6. Click **Test Connection** to ensure that the credentials are correct.

Messages will display at the top of the page to indicate if the credentials are valid or invalid, or if there were issues connecting to the Salesforce server (not credential-related).

7. **Save** your changes. If you did not test the credentials, they will be tested now. Invalid credentials will not be saved.

The credentials are stored and can be used in the Network Bridge configuration.

Adding a Network bridge environment

Network administrators and data managers can create a Network bridge. Network bridges are created for a country or for each CRM org.

To add a Network bridge:

1. In the Admin console, click **System Interfaces > Network Bridge**.
2. On the Network Bridge page, click **Add Network Bridge**.
3. On the **Import Network Bridge** dialog box, select **CRM Data Subscription** and click **Next**.

The New Network Bridge page displays.



Network Bridge > New Network Bridge

New Network Bridge

Cancel Save

System

Bridge Enabled Yes No

Name

Type CRM Data Subscription ?

Details

System

Target Subscription

Network Integration User

Revision Data Value (Optional)

Country

Connection Settings

Salesforce Credential

Validate

Sync Settings

Enhanced Inactive Record Sync ?

Job Trigger Configuration

JOB SCHEDULE

Schedule Scheduled Manual

JOB TRIGGERS

Subsequent Actions When this job fails then send an email to Woods, Sara.

+ Add Trigger

4. In the **System** section, complete the following details:
 - a. **Bridge Enabled:** Choose **Yes** so that you can run the subscription after the bridge is configured.
 - b. **Name:** Type a name for the subscription; for example, US_DS, or UK_DS.



5. In the **Details** section, complete the following information:
 - a. **System:** Select the source system for the subscription. Typically, this is the org ID of the CRM org.
 - b. **Target subscription:** Select the target subscription for exporting the records. The list is filtered by the source system you selected.
 - c. **Network Integration User:** Select the name of the Network integration user. The list is populated with the integration users in your Network instance.
 - d. **Revision Data Value (Optional):** Type the delta start ID that you want the target subscription to run from. For example, if you want to run a subscription starting with the last record from the previous export, you can add the Network ID of the record here. The Delta start and end IDs are available in the **Job History** section on the target subscription page or in the Job Details page. Typically, this value should be left empty.
 - e. **Country:** Select the applicable country.
6. In the **Connection Settings** section, expand the list and select the credential that is stored in Network on the External Credentials page.
7. In the **Sync Settings** section, select **Enhanced Inactive Record Sync** if you want CRM to be updated to reflect inactive records in Network.

In Veeva CRM, the setting FILTER_INACTIVE_NETWORK_RECORDS_vod must also be enabled for the inactive records to sync between the two applications.
8. Click **Validate** to test the connection to the Veeva CRM org using the stored credentials.

A message displays at the top of the page to advise whether the credentials are valid or not. The credentials must be validated before the Network bridge configuration can be saved. If the credentials are not validating, see the section below called "Whitelist Network IP addresses in Veeva CRM."
9. In the **Job Trigger Configuration** section, define how and when you want the subscription job to run.
 - **Manual:** Select so that the job runs only when you click the **Start Job** button on the subscription page.
 - **Scheduled:** Define the schedule settings for the subscription based on the timezone defined in your user profile. Multiple schedules can be defined for each subscription.
10. Under the **Job Triggers** heading, you 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.

To schedule a subsequent action:

- a. Click + **Add Trigger**.
- b. Expand the **When this happens** list and choose the job outcome that will trigger the action.
- c. 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).
- d. 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.



- e. If you selected **start another job**, expand the subscription list and choose the job to start. The subscriptions are categorized by type. For example, you might want to schedule a target subscription to start when the bridge subscription completes so you can send updates to your data warehouse.

11. Click **Save**.

When the Network Bridge job runs, the target subscription files are transformed into the format required for Veeva CRM accounts. Your Veeva CRM org will be updated with the data from Network.

Job Details

After a data subscription job completes, review the Job Details page.

To access the Job Details page, click the job ID in the **Job History** section at the bottom of the Network Bridge page. The **Job History** section displays after the first Network Bridge subscription job runs.

Job History									1 of 9 < >
ID	START TIME	DURATION	ADD	EDIT	ERROR	TYPE	OUTCOME	SUBSCRIPTION TRIGGERS?	
299	2018-04-03 07:00:00	4 minutes	291	309	6	SCHEDULED	COMPLETE	Yes	
297	2018-04-03 03:00:00	4 minutes	63	42	0	SCHEDULED	COMPLETE	No	
295	2018-04-03 01:20:00	4 minutes	12	137	2	SCHEDULED	COMPLETE	Yes	
293	2018-04-02 07:00:00	4 minutes	86	63	0	SCHEDULED	COMPLETE	No	
291	2018-04-02 03:00:00	4 minutes	16	9	0	SCHEDULED	COMPLETE	Yes	

The page provides information about the outcome (complete or failed), the objects that were added and edited, and any errors that occurred.

The **Error Report Location** section displays the FTP server and site (`/outbound/crm_data_subscription/<job_id>.csv`). If the job contained no errors the file is still created, but it will be empty. Click **Download File** to save the error file to your local server.

The **Job Trigger Summary** section identifies how this Network bridge job started. It could have been started from a job trigger on another subscription (for example, an OpenData subscription or a source subscription).

The **Job Initiation** value 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.

If subsequent jobs or emails were triggered by this job, the details displays beside those headings.



Job Details (ID: 85)

▼ Overview

Subscription network_bridge_US	Start Time 2019-02-06T22:37:00-08:00
Job ID 85	Duration 10 minutes
Percent Complete 100.00%	Current Stage FinalStage
Outcome COMPLETE	Started By PM Admin
Trigger MANUAL	

▼ Bridge Summary

OBJECT TYPE	ADDS	EDITS	ERRORS
CONTROLLED_ADDRESS	0	0	0
LICENSE_ASSMCA	0	0	0
LICENSE_OH	0	0	0
HCP	0	37	0
HCO	0	22	0
ADDRESS	0	70	0
LICENSE	0	22	0
PARENTHCO	0	34	0

▼ Batch Job Details

TOTAL RECORDS EXPORTED	SUBSCRIPTION FILE	DELTA REVISION FIRST	DELTA REVISION LAST
60	exp_00000056.zip	0	933930013395943423

▼ Error Breakdown

ERROR TYPE	#
Salesforce Upsert Error	0
Mapping Errors	0

▼ Error Report Location

FTP SERVER	LOCATION
pmyas2.dev.com	outbound/crm_data_subscription/85.csv

[Download File](#)

▼ Job Trigger Summary

Job Initiation MANUAL

Job(s) Triggered This job did not trigger any jobs.

Email(s) Triggered	EMAIL RECIPIENT	STATUS
	Woods, Sara (sara.admin)	Email sent.

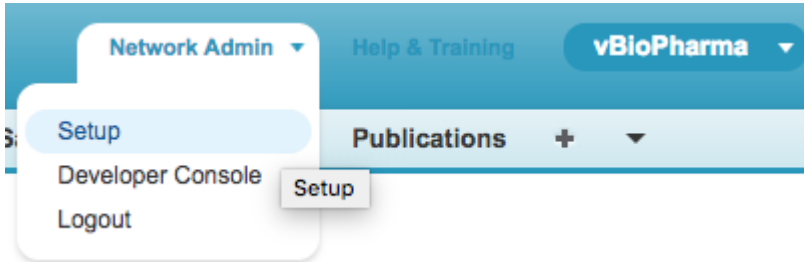


Whitelist Network IP addresses in Veeva CRM

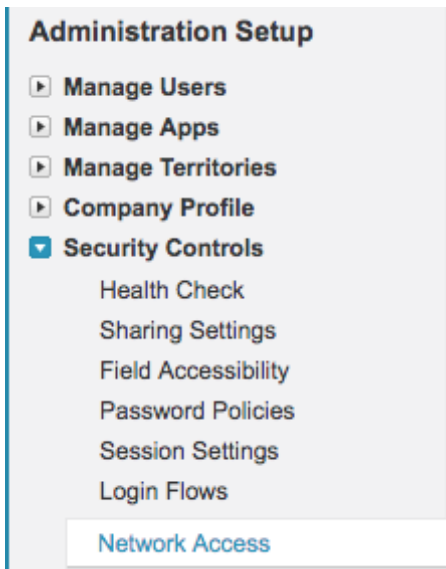
If Salesforce credentials are not validating in Network, CRM administrators might need to whitelist Network NAT IP addresses in CRM.

To whitelist Network IP addresses in CRM:

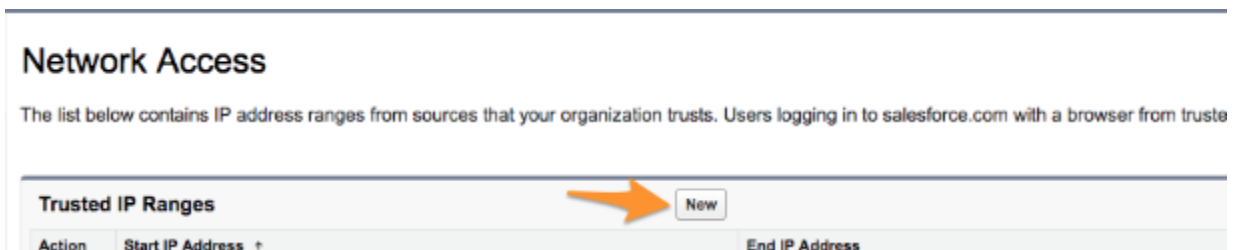
1. Log into to Veeva CRM as a system administrator.
2. On the right side of the page, click on the user name and select **Setup**.



3. In the **Administration Setup**, expand the **Security Controls** section and select **Network Access**.



4. At the top of the Network Access page, click **New**.





- 5. Create entries by filling in the **Start IP Address** and **End IP Address** for the NAT gateway for each of the following IP addresses:

US IP addresses	EU IP addresses
13.59.225.31	34.241.15.234
18.188.140.111	34.243.156.248
18.216.182.16	52.208.136.96
18.216.246.38	52.209.181.239
18.217.229.142	52.210.45.166
18.218.18.216	52.210.157.80
18.219.254.2	
18.219.254.183	
18.222.10.133	
52.15.239.60	

Network Access

Trusted IP Range Edit

Enter the range of valid IP addresses from which user logins are trusted. Users logging in from trusted IP addresses are not asked to activate their c such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.

Please specify IP range

Start IP Address: 18.219.254.183

End IP Address: 18.219.254.183

Description: Network NAT

Save Cancel

Managing Network bridge configurations

Network administrators can update configurations between Network environments by exporting and importing configuration packages. Network Bridge configurations can be included in export packages so they can be imported to another environment. For example, you can test the Network Bridge in your Sandbox environment and then create an export package with the configuration and import it to a Production environment. Salesforce credentials are not migrated through configuration management.



Configuration Packages - Export > Create New Export Package

Create New Export Package

Cancel Export

Name: Network Bridge Export

Description: Network Bridge Export Package

Target Environment: verteo.com (515)

⚠ The selected configurations might reference data model fields. Data model fields are not automatically added, so ensure that any required data model fields are also selected for export.

Available Configurations Collapse All

Search Configurations

- ▶ Default Match Configurations
 - General Settings
- ▶ Inbox Task Groups
- ▶ Network Address Inheritance Rules
- ▼ Network Bridge
 - network_bridge_US
 - demo_network_bridge
 - crm_gb_bridge
- ▶ OpenData Subscriptions
- ▶ Reference Aliases
- ▶ Security Settings
- ▶ Source Subscriptions

Selected Configurations Collapse All

Search Configurations

- ▼ Network Bridge
 - network_bridge_BR
- ▼ System Definitions
 - VCRM-00DQ0000GKI1IMAD
- ▼ Target Subscriptions
 - crm_target_cyri_BR

For more information about managing configurations between Network environments, see the topic called [Managing Configurations](#) in the *Veeva Network Online Help*.

UPDATED STATE LICENSE MAPPINGS

The Network State License Mappings is updated to include the `rxa_eligible__v` field. Currently, the license mapping includes the `license_eligibility__v` field which reflects an HCP's prescriptive authority. The RXA eligible field identifies an HCP's sample authority eligibility by state, degree, and license. Sample eligibility and prescriptive authority can be different, depending on state laws.



You can customize your CRM sample formulas to use one or both sample eligibility fields to determine which information to use to know if an HCP is eligible to receive samples.

License Mapping

Mapping	Network (License)	Veeva CRM (address_vod__c)
Existing mapping	Prescriptive Authority license_eligibility__v	Network Prescriptive Authority Network_Sample_Eligibility_vod__c
New mapping	Sample Eligibility rx_a_eligible__v	Network RXA Eligible Network_RXA_Eligible_vod__c (new field)

To backfill your license data, use the Network bridge to resend HCPs with a full extract from Network.

The sample eligibility data will be loaded into CRM using the CRM Data Subscription process. Data change requests (DCRs) should not be submitted to update the field.

Note: These license updates will be supported in Veeva CRM version 19R3.0. More information will be available in the *Veeva CRM 19R3.0 Release Notes*.

VEEVA CONNECTOR

Customers can now communicate with Veeva CRM, Vault, or Nitro using the Veeva Connector feature. Using the Veeva Connector, you can extract object data from CRM or Vault or upload Network data to Nitro. Previously, files had to be created and transferred manually.

The Veeva Connector is enabled by default for all Network instances.

Supported integrations

- **Veeva CRM** - Extract object data to Network FTP using SOQL.
- **Veeva Vault** - Extract object data to Network FTP using VQL.
- **Veeva Nitro** - Upload Network data to Nitro FTP using target subscriptions.

Each integration must be configured in your Network instance.

CRM INTEGRATION

Customers that use Network and Veeva CRM can now extract object data from Veeva CRM and publish the .csv files to Network's FTP server. Previously, users had to manually create the .csv files and load them to the FTP server.

Overview of tasks

To extract data from CRM, the following tasks must be completed:

- **Add Salesforce credentials to Network** - The credentials are used to connect to Veeva CRM.
- **Create a connector** - Connect to Veeva CRM to extract the object data using SOQL and publish the files to Network's FTP server.



The following sections describe how to complete these tasks.

Add Salesforce credentials

Add the Salesforce credentials so they are saved in Network and you can refer to them when you are creating the Veeva Connector configuration for CRM.

To add the Salesforce credentials:

1. In the Admin console, click **Settings > External Credentials**.
2. Click **Add Credentials**.
3. In the **New External Credential** dialog, select **Salesforce**. Click **OK**.
4. On the New External Credential page, provide the following information:
 - a. **Name** - Type a name for the credential. For example, *Verteo CRM US*. Names must be unique.
 - b. **Username** - The CRM integration user ID.
 - c. **Password** - The password for the CRM integration user.
5. In the **URL** list, choose one of the following URLs for the Salesforce domain:
 - `https://login.salesforce.com` - Use for production instances.
 - `https://test.salesforce.com` - Use for test instances.
6. Click **Test Connection** to ensure that the credentials are correct.

Messages will display at the top of the page to indicate if the credentials are valid or invalid, or if there were issues connecting to the Salesforce server (not credential-related).

7. **Save** your changes. If you did not test the credentials, they will be tested now. Invalid credentials will not be saved.

The credentials are stored and can be used in the Veeva Connector configuration for CRM.



Create a connector to Veeva CRM

Create a Veeva Connector configuration for CRM so you can extract the object data and load it to your Network FTP.

1. In the Admin console, click **System Interfaces > Veeva Connector**.
2. Click **Add Veeva Connector**.
3. In the **Add Veeva Connector** dialog, expand the lists to select the following values:
 - **Connector Type** - CRM
 - **Operation** - Extract

Click **Next**.

4. In the **Details** section, choose **Enabled** and define the following information:
 - **Name** - Type a meaningful name for the connector.
 - **System** - Choose a system. If you do not have a system configured for CRM, create one by navigating to **System Interfaces > Systems**.
5. Choose the Salesforce credentials in the **Connection Settings** section.

Click **Test Connection** to ensure that the credentials are valid.

6. In the **Extract Settings** section, define the Network FTP path to store the .csv files that will be extracted from CRM.

Tip: Define the FTP path that you will use to load the data into Network using a source subscription.

7. Under the **Extraction Objects** heading, specify the objects that will be taken from CRM. For each object, define the following details:
 - **Object** - The CRM object name; for example, *Account*.
 - **File Prefix** - The prefix for the .csv file that will be saved to Network FTP server.

The .csv file name is the following format:

`<prefix>_<organization_id>_<timestamp>.csv.`

Example: `account_5014000000C8cuI024_20190825_1345.csv`

- **Extraction SOQL** - The Salesforce Object Query Language (SOQL) query to extract the object from CRM.



▼ **Extract Settings**

FTP Path ?

▼ **EXTRACTION OBJECTS**

Object ✕

File Prefix

Extraction SOQL

Object ✕

File Prefix

Extraction SOQL

+ Add Object

To include more objects, click **+ Add Object**.

8. In the **Job Trigger Configuration** section, define the schedule for the job and any subsequent actions that will start when this job finishes.

Job Schedule - Run the job manually or on a scheduled basis. If you select **Manual**, the job only runs when you click the **Start Job** button on the configuration page.

Job Triggers - Trigger other actions to start after a job runs.

Available triggers:

- **Send email** - Specify users that should be notified for successful and unsuccessful job outcomes.
- **Start a job** - Start a subsequent job when this job successfully completes. For example, you can start a source subscription to load the data into Network when the CRM extract job completes.

For more information, see [Subscription job triggers](#).

9. **Save** your changes.

The Veeva CRM integration is complete. When the extract job runs, Network will connect to CRM to retrieve the object data and load the .csv files to Network's FTP server. To load the data into Network, create a source subscription. For more information, see [Add a source subscription](#).



VAULT INTEGRATION

Customers that use Network and Veeva Vault can now extract object data from Vault and publish the .csv files to Network's FTP server. For example, you might want to extract product data from Vault and load it into a custom object that you have enabled in your Network instance.

Overview of tasks

To extract data from Vault, the following tasks must be completed:

- **Add Vault credentials to Network** - The credentials are used to connect to Veeva Vault.
- **Create a connector** - Connect to Veeva Vault to extract the object data using VQL and publish the files to Network's FTP server.

The following sections describe how to complete these tasks.

Add Vault credentials

Add the login credentials for your Vault application so they are saved in Network and you can refer to them when you are creating the Veeva Connector configuration for Vault.

External Credentials > New External Credential

New External Credential

Type Vault

Name Verteo Vault US

Username jennifer.stevens@verteo.com

Password *****

URL https://verteo-veevavault.com

Test Connection

Cancel Save

To add the Vault credentials:

1. In the Admin console, click **Settings > External Credentials**.
2. Click **Add Credentials**.
3. In the **New External Credential** dialog, select **Vault**. Click **OK**.
4. On the New External Credential page, provide the following information:
 - a. **Name** - Type a name for the credential. For example, *Verteo Vault US*. Names must be unique.
 - b. **Username** - The user name to log into your Vault application.
 - c. **Password** - The password for the Vault user.
5. In the **URL** list, type the URL for your Vault application:



6. Click **Test Connection** to ensure that the credentials are correct.

Messages will display at the top of the page to indicate if the credentials are valid or invalid, or if there were issues connecting to the Vault server (not credential-related).

7. **Save** your changes. If you did not test the credentials, they will be tested now. Invalid credentials will not be saved.

The credentials are stored and can be used in the Veeva Connector configuration for Veeva Vault.

Create a connector to Veeva Vault

Create a Veeva Connector configuration for Vault so you can extract the object data and load it to your Network FTP.

1. In the Admin console, click **System Interfaces > Veeva Connector**.
2. Click **Add Veeva Connector**.
3. In the **Add Veeva Connector** dialog, expand the lists to select the following values:
 - **Connector Type** - Vault
 - **Operation** - Extract

Click **Next**.

4. In the **Details** section, choose **Enabled** and define the following information:
 - **Name** - Type a meaningful name for the connector.
 - **System** - Choose a system. If you do not have a system configured for Vault, navigate to **System Interfaces > Systems**.
5. Choose the Vault credentials in the **Connection Settings** section.

Click **Test Connection** to ensure that the credentials are valid.

6. In the **Extract Settings** section, define the Network FTP path to store the .csv files that will be extracted from Vault.

Tip: Define the FTP path that you will use to load the data into Network using a source subscription.

7. Under the **Extraction Objects** heading, specify the objects to be retrieved from Vault. For each object, define the following details:
 - **Object** - The Vault object name; for example, `product__v`.
 - **File Prefix** - The prefix for the .csv file that will be saved to Network FTP server.

The .csv file name is the following format:

`<prefix>_<organization_id>_<timestamp>.csv.`

Example: `product_5014000000C8cuI024_20190825_1345.csv.`

- **Extraction VQL** - The Vault Query Language (VQL) query to extract the object data from Vault.



▼ Extract Settings

FTP Path ⓘ //inbound/vault/productimport

▼ EXTRACTION OBJECTS

Object Product__v

File Prefix product

Extraction VQL select id, external_id__v, applicant__c, application__c, name__v, status__v from product__v

+ Add Object

To include more objects, click **+ Add Object**.

8. In the **Job Trigger Configuration** section, define the schedule for the job and any subsequent actions that will start when this job finishes.

Job Schedule - Run the job manually or on a scheduled basis. If you select **Manual**, the job only runs when you click the **Start Job** button on the configuration page.

Job Triggers - Trigger other actions to start after a job runs.

Available triggers:

- **Send email** - Specify users that should be notified for successful and unsuccessful job outcomes.
- **Start a job** - Start a subsequent job when this job successfully completes. For example, you can start a source subscription to load the data into Network when the Vault exact job completes.

For more information, see [Subscription job triggers](#).

9. **Save** your changes.

The Veeva Vault integration is complete. When the extract job runs, Network will connect to Vault to retrieve the object data and load the .csv files to Network's FTP server. To load the data into Network, create a source subscription. For more information, see [Add a source subscription](#).



NITRO INTEGRATION

Customers that use Network and Veeva Nitro can now publish Network data to Nitro. Previously, files had to be loaded manually into Veeva Nitro for processing on a regular basis. The process is now streamlined to reduce the number of manual steps.

Integration highlights

The following steps have been automated to support the upload process:

- Exporting CSV files in individual ZIP files
- Generating Nitro control files (CTL) in Network
- Uploading .zip files and CTL files from Network to Nitro SFTP for processing

Overview of tasks

To publish Network data to Nitro, the following tasks must be completed:

- **Add Veeva Nitro FTP and API credentials to Network** - The credentials are used to publish files to Nitro's FTP server and to connect to Veeva Nitro.
- **Create a system** - The system for Nitro is used for target subscriptions and the Veeva connector.
- **Create a target subscription** - Export the Network data in individual files to your FTP server.
- **Create a connector** - Connect to Veeva Nitro to publish the Network data to Nitro's FTP.

The following sections describe how to complete these tasks.

Veeva Nitro requirements

Veeva Nitro must also be configured to enable the integration with Network. For more information, contact your Veeva Nitro representative.

Add Nitro credentials to Network

Add the Nitro FTP and API credentials so Network can access Nitro.

FTP credentials

Add the FTP credentials so Network can publish files to your Nitro FTP server.



Nitro FTP

Cancel Save

Type Nitro FTP

Name Nitro FTP

Username sftp_verteo_nitroftp

Password

URL sftp:// verteo-02-sftp-us.veevanitro.com

Test Connection

To add the FTP credentials:

1. In the Admin console, click **Settings > External Credentials**.
2. Click **Add Credentials**.
3. In the **New External Credential** dialog, select **Nitro FTP**. Click **OK**.
4. Type the credentials and the URL to the appropriate server.
5. Click **Test Connection** to ensure the credentials are correct.
6. **Save** your changes.

API credentials

These credentials are used to connect to Veeva Nitro.

To add the API credentials:

1. On the External Credentials page, click **Add Credentials**.
2. In the **New External Credential** dialog, select **Nitro API**. Click **OK**.
3. Type the credentials that can be used to log into your Nitro application.
4. Type the URL to the Nitro server.
5. Click **Test Connection** to ensure the credentials are correct. Network will connect to Nitro using the SFTP protocol.
6. Click **Generate API Key**. The Nitro API key is used in the CTL file generation.

If the password changes for these user credentials, the API key becomes invalid. A new key must be generated.
7. **Save** your changes.



Create a system

Create the system (**System Interfaces > Systems**) that you will use for target subscriptions and the connector. The settings for the system are minimal. Ensure that the **Name** and **Description** specifically identifies the system's purpose to avoid confusion.

Example Nitro system

New System Cancel Save

▼ **Details**

Name

Description

Proprietary Yes No

Restricted data Yes No

Third Party Master Yes No

Unmerge Ability

Create a target subscription

Use a target subscription to export data from Network in individually compressed (zip) files so the Network data can be uploaded to the Nitro FTP server.

To create the target subscription:

1. In the Admin console, click **System Interfaces > Target Subscriptions**.
2. Click **Add Subscription**.
3. Configure the subscription **Details** and **General Export Options** sections as usual.
For information about target subscription settings, see [Add a target subscription](#).
4. In the **File Format** section, select **Zip Files Individually**.
5. Save and run the target subscription.



Nitro_target Details

Export by VID Clone Start Job Cancel Save

Details

General Export Options

TARGETED RECORD OPTIONS

Full Data Extract Full Delta

Record Type

Record State All Valid & Under Review

Unmask Customer Opt-out records

Export Only Updated Children

Save Delta State

Include Source Data view in export files

Unmapped Reference Codes

HIERARCHY

Level of Hierarchy to Export

Apply "Export Options" to the target records related entities

REFERENCE DATA

Include Reference Data Files

Reference File Version

FILE FORMAT

Format Encoding

Delimiter

Include header row?

Text Qualifier

Zip Files Individually?

Include Name and Time in Filename

FTP Path Default Custom

On the Job Details page, the **FTP Path** indicates if the files were zipped individually.

Example path format:

```
/outbound/<system>/<target subscription name>/<sub directory with archive files>
```



Next steps

When the files are uploaded to your Network FTP server, create a connector to Nitro so you can publish the data to Nitro's FTP server.

Create a connector to Veeva Nitro

Configure the Veeva Connector to upload the target subscription data to Nitro's FTP server.

Nitro FTP Connector Details Clone Start Cancel Save

▼ Details

Connector Enabled Yes No

Name

Connector Type Nitro

Operation Upload ⓘ

▼ Network Data

System

Target Subscription ⓘ

▼ Connection Settings

Nitro FTP Credential ⓘ

Nitro API Credential ⓘ

▼ Control File (CTL) Settings

Network CSV Filename ⓘ

Target Table Name

Max Error Count

[+ Add File](#)



1. In the Admin console, click **System Interfaces > Veeva Connector**.
2. Click **Add Veeva Connector**.
3. In the **Add Veeva Connector** dialog, expand the lists to select the following values:
 - **Connector Type** - Nitro
 - **Operation** - Upload

Click **Next**.

4. In the **Details** section, choose **Enabled** and type a **Name** for the connector.
5. Define the following details in the **Network Data** section:
 - **System** - Select the Nitro system that you created.
 - **Target Subscription** - Select the target system that you used to export the data for Nitro.
6. Specify the Nitro credentials in the **Connection Settings** section:
 - **Nitro FTP Credential** - Choose the credential that you created for Nitro FTP.
 - **Nitro API Credential** - Choose the credential that you created for Nitro API.

For each credential, click **Test Connection** to ensure that the credentials are valid.

7. In the **Control File (CTL) Settings** section, define the following details:
 - **Network CSV Filename** - The name of the .csv file that you exported in the target subscription; for example, `hcp.csv` or `address.csv`.
 - **Target Table Name** - The name of the staging table in Veeva Nitro.
 - **Max Error Count** - Set a maximum number of errors that can occur before the job stops processing.

To include more files, click **+ Add File**.

8. In the **Job Trigger Configuration** section, define the schedule for the job and any subsequent actions that will start when this job finishes.

Job Schedule - Run the subscription manually or on a scheduled basis. If you select **Manual**, the subscription only runs when you click the **Start Job** button on the subscription page.

Job Triggers - Trigger other actions to start after a job runs.

Available triggers:

- **Send email** - Specify users that should be notified for successful and unsuccessful job outcomes.
- **Start a job** - Start a subsequent job when this job successfully completes.

For more information, see [Subscription job triggers](#).

9. **Save** your changes.

When the job runs, Network generates the .ctl files and connects to the Nitro FTP to publish the files.

API updates

The Network API is updated to support the integration with Nitro. For more information, see the "API" section in these *Release Notes*.



Security settings

PASSWORD POLICIES

The Network password policies have been updated to include the ability to enforce at least one lowercase character.

This enhancement is available by default in all Network Production instances; password policies do not apply to Sandbox instances.

Updating password policies

Administrators can update the password policy for their Production instances.

To update the policy:

1. In the Admin console, click **Settings > Security Settings**.
2. Choose the policy; for example, Classic.
3. Click **Edit**.
4. In the **Security Settings** section, select the **Lower-case letter** option.
5. **Save** your changes.

The next time users change their password, a lowercase letter will be required.

To immediately enforce a new password security policy, click **Reset All Passwords** on the Security Settings page. Your Network users will be notified to change their password.

API

VERSION UPDATE

The Network API is updated to v19.0.

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

API ENRICHED RESULTS

A new parameter is introduced to help you integrate with Network more easily. The parameter, `enrichedResults` displays labels for reference type fields so you do not have to use reference aliases. For example, specify the parameter in the Search API so you can see the full reference values for a specific language. When the parameter is used, the response displays the Network code for the reference type field, as usual, followed by a new helper attribute, `<reference_type_field_name>_value__u`, that displays the reference value. You can use this helper attribute to do your mappings instead of creating reference aliases.



Example

```
"medical_degree_1__v": "MD",  
    "medical_degree_1__v_value__u": "Doctor of Medicine",
```

These updates are supported for v19.0.

Supported API:

The new parameter is supported for the following API calls:

- Search
- Retrieve/batch retrieve entity
- Retrieve child entity

Parameter

The following parameters have been added to display labels in the supported API:

- `enrichedResults` (optional) - True or False (default)
- `resultLanguage` - (optional) - Use the language code; for example, EN. If this parameter is not provided, the requester's language is used (typically English). It is recommended to supply this parameter with the `enrichedResults` parameter.

Search API

Use a new parameter to see the reference labels from the Search API.

Sample request

```
https://my.veevanetwork.com/api/v19.0/search?q=*&enrichedResults=true&resultLanguage=en
```

Response

```
{  
  "responseStatus": "SUCCESS",  
  "entities": [  
    {  
      "entityId": "243035950412727300",  
      "entityType": "HCP",  
      "metaData": {  
        "highlightTerms": [],  
        "resultIsFromMaster": true,  
        "vid__v": "243035950412727300",  
        "relevance": 121.49423,  
        "highlights": {}  
      }  
    }  
  ]  
}
```



```

    },
    "entity": {
      "record_state__v": "VALID",
      "record_state__v_value__u": "Valid",
      "is_externally_mastered__v": false,
      "birth_year__v": 1983,
      "hcp_type__v": "P",
      "hcp_type__v_value__u": "Prescriber",
      "formatted_name__v": "SMITHA JOHN",
      "last_name__v": "JOHN",
      "hcp_status__v": "A",
      "hcp_status__v_value__u": "Active",
      "type_of_practice__v": "20",
      "medical_degree_1__v": "MD",
      "medical_degree_1__v_value__u": "Doctor of Medicine",
      "addresses__v": [
        {
          "record_state__v": "VALID",
          "record_state__v_value__u": "Valid",
          "delivery_address_1__v": "720 Westview Dr Sw",
          "thoroughfare_name__v": "Westview",
          "premise_number__v": "720",
          "phone_1__v": "4047521857",
          "postal_code__v": "30310",
          "administrative_area__v": "US-GA",
          "administrative_area__v_value__u": "Georgia",
          ...
        }
      ]
    }
  }

```

Retrieve API

Use the new parameters in the Retrieve, Batch Retrieve, and Retrieve Child API.

When the parameter is used, the following data is returned:

- Reference value labels - `__value__u` attribute helper
- Parent HCO corporate name - `parent_hco_corp_name__v`
- Parent HCO address - `parenthco_address__u`
- Parent HCO record state - `parenthco_record_state__u`
- Parent HCO status - `parenthco_status__u`
- Address Network entity ID (VID) for licenses - `address_vid__v__u`
- Sub-object sorting - Network sorting logic for sub-objects (for example, active objects are listed before inactive objects).

Note: The helper attributes with the `__u` suffix denote values that are typically displayed in the Network UI.



Sample request

```
GET
https://my.veevanetwork.com/api/v19.0/entity/Network:Entity:632598741001125
25&enrichedResults=true&resultLanguage=en
```

Response

```
{
  "responseStatus": "SUCCESS",
  "entities": [
    {
      "entityId": "260905099126113285",
      "entityType": "HCP",
      "metaData": {},
      "entity": {
        "gender__v": "M",
        "gender__v_label": "Male"
      }
    }
  ]
}
{
  "responseStatus": "SUCCESS",
  "entities": [
    {
      "entityId": "260905099126113285",
      "entityType": "HCP",
      "metaData": {},
      "entity": {
        "gender__v": "M",
        "gender__v_value__u": "Male",
        "years_in_progress__v": 0,
        "birth_year__v": 1960,
        "knipper_id__v": "10102649",
        "record_owner_type__v": "VOD",
        "record_owner_type__v_value__u": "Veeva OpenData",
        "first_name__v": "Andy",
        "education_level__v": "RESIDENCY",
        "grad_training__v": "N",
        "grad_training__v_value__u": "No",
        "npi_num__v": "1053475160",
        "record_delta_id__v": "934925280678543359",
        "record_owner_name__v": "OpenData",
        "grad_trg_end_date__v": "1993-06-30",
        "place_of_employment__v": "6",
        "kaiser__v": "N",
        "formatted_name__v": "Andy Green",
        "birth_city__v": "ROMANIA",
        "rank__c": 3,
        "email_2__v": "andy@duke.edu",
        "type_of_practice__v": "4",
        "hcp_status__v": "A",
        "hcp_status__v_value__u": "Active",
        "status_update_time__v": "2018-09-24T20:07:50.000Z",
      }
    }
  ]
}
```



```

"modified_date__v": "2019-08-01T21:08:14.000Z",
"global_target__c": 0,
"record_version__v": 7,
"vid__v": "260905099126113285",
"is_externally_mastered__v": false,
"specialty_1_rank__v": 1,
"specialty_1__v": "CD",
"specialty_1__v_value__u": "Cardiovascular Disease",
"upin__v": "D92144",
"hcp_type__v": "P",
"hcp_type__v_value__u": "Prescriber",
"master_vid__v": "260905099126113285",
"last_name__v": "Green",
"sha_id__v": "261831",
"medical_degree_1__v": "MD",
"medical_degree_1__v_value__u": "Doctor of Medicine",
"fellow__v": "N",
"fellow__v": "No",
"email_source_2__c": "ACME",
"primary_country__v": "US",
"primary_country__v_value__u": "United States",
"created_date__v": "2018-09-24T20:07:50.000Z",
"mpa__v": "4",
"ams_id__v": "448905",
"email_1__v": "andy@green.com",
"verteo_id__c": "V-KX4ETV8CBZ",
"record_state__v": "VALID",
"record_state__v_value__u": "Valid",
"email_source_1__c": "SAP",
"me_id__v": "0080186024",

....

```

UPDATES TO SUPPORT THE NITRO INTEGRATION

The Network API is updated to support the Veeva Nitro-Network integration.

Create target subscription job

New parameter

The following parameter is now supported. It is not required.

- `export_archive`

Values

- **all** - Compress all .csv files into a single .zip file. The .zip file will be exported to the specified path in the target subscription (if not specified, the default path is used).
- **individual** - Compress each .csv file into an individual .zip file. The .zip files will be exported to a separate subfolder in the specified path in the target subscription (if not specified, the default path is used).



- **none** - Does not compress .csv files. Files will be exported to a separate subfolder in the specified path in the target subscription (if not specified, the default path is used).

Sample request

```
POST
https://my.veevanetwork.com/api/v18.0/systems/Nitro/target_subscriptions/nitro_dwh/job?export_archive=individual
```

Create subscription job

The `export_archive` parameter and values are also supported in the Create Subscription Job API for target subscriptions.

Sample request

```
POST https://my.veevanetwork.com/api/v18.0/subscriptions/nitro_dwh/job?export_archive=individual
```

Retrieve target subscription job

API Response fields

These new response fields are used in the control file (CTL) generation.

- **exportFormatDelimiter** - The .csv delimiter.
- **exportFormatTextQualifier** - The .csv text qualifier.
- **export_archive** - The archive mode of the target subscription.

Sample response

```
{
  "responseStatus": "SUCCESS",
  "subscriptionId": 15,
  "subscriptionName": "targetSubscriptionCustomer",
  "durationInMilliseconds": 2000,
  "type": "MANUAL",
  "errorCount": 0,
  "badRecordCount": 0,
  "exportReferenceCount": 0,
  "exportFull": true,
  "exportIncludeReference": false,
  "exportUpdatedChildOnly": false,
  "exportSetSubscriptionStateOnFull": false,
  "exportFormat": "CSV",
  "exportReferenceVersion": "4",
  "exportActiveOnly": false,
  "jobExportCount": {
    "LICENSE": 3961,
    "RELATION": 333,
  }
}
```



```
"HCO": 819,  
"HCP": 1060,  
"ADDRESS": 1801,  
"EXTERNALKEYS": 8038  
},  
"job_id": 453,  
"job_status": "COMPLETE",  
"created_date": "2019-06-17T10:58:49.000-08:00",  
"data_revision_first": "0",  
"data_revision_last": "929335226137870335",  
"export_package_path":  
"export/change_request/targetSubscriptionCustomer/exp_000001C5.zip",  
"total_records_exported": "1879",  
"completed_date": "2019-06-17T10:58:51.000-08:00",  
"export_archive": individual,  
"exportFormatDelimiter": "|",  
"exportFormatTextQualifier": "\"\""  
}
```

Retrieve subscription job

The new response fields are also supported for target subscriptions in the Retrieve Subscription Job API.

- **exportFormatDelimiter** - The .csv delimiter.
- **exportFormatTextQualifier** - The .csv text qualifier.
- **export_archive** - The archive mode of the target subscription.

More information

For more information about the Network - Nitro integration, see the "Nitro integration" topic in these *Release Notes*.