



veeva Network

Veeva Network 20R2.0.1 Release Notes

September 2020



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About these Release Notes

These Release Notes describe all features that are included in Veeva Network 20R2.0.

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

The following enhancement has been added since the Early version was published.

- **Merged addresses** - For data quality, Veeva OpenData will begin running bulk merge jobs to eliminate duplicate addresses. This might impact data for some Network features.

Update: This topic has been updated since the Production version of the Release Notes was published. Veeva OpenData will begin running bulk merge jobs on September 25, 2020. Previously, the date was September 10, 2020.

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 20R2.0 major release.

			ST	DS	DM	AD
Widgets						
Search widget - Search by alternate key	You can now search by alternate key using the ID field in the advanced search form.	20R2.0	●	●	●	●
Search widget - navigation updates	The Back to Search link now returns you to the search results after you submit an add request.	20R2.0	●	●	●	●
Profile layouts	Administrators can now assign specific profile layouts for each country to the widget.	20R2.0	●	●	●	●
Affiliation widget	The homepage title has been changed to Influence Maps .	20R2.0	●	●	●	●
Search widget - Advanced search	In the Advanced Search form, enhancements have been made to the Country field to improve your search experience.	20R1.1	●	●	●	●
Custom keys	Network widgets now support creating custom keys that are cross references to the source ID.	20R1.1			●	●
Filter by ParentHCO	A preset filter can be added to filter the search widget and profile widget for specific parent HCOs.	20R1.1	●	●	●	●
Profiles						
Object icon badges	Tooltips for object icon badges more clearly identify the record state.	20R2.0	●	●	●	●
Reports						
Job details	The Folder/ZIP file name is now included in the Job Details for reporting.	20R2.0			●	●
Source Subscriptions						
New user interface	Network now provides a wizard to simplify the process of creating a source subscription.	20R2.0			●	●



			ST	DS	DM	AD
Veeva OpenData subscriptions						
OpenData fields	All Veeva OpenData fields are now mastered by default in new Network instances.	20R2.0			●	●
Download related HCOs	Subscription jobs can now download parent HCOs that are related to HCOs and HCPs in your Network instance.	20R2.0			●	●
Merging addresses	For data quality, Veeva OpenData US will begin running bulk merge jobs to eliminate duplicate addresses. This might impact data for some Network features.	20R2.0			●	●
Refresh subscriptions	Administrators can choose to download all new records that match updated HCP/HCO filter criteria the next time the job runs.	20R1.1			●	●
Country subscriptions for all records	When customers subscribe to all records for a country, that subscription page is updated to reflect those details.	20R1.1			●	●
Geo Subdivision subscriptions	The Geo Subdivision and Geo Subdivision 2 subscriptions are now available for Russia.	20R1.1			●	●
Match against Veeva OpenData						
Performance Improvements	Performance improvements have been made to jobs where large numbers of new records are downloaded from OpenData.	20R1.1			●	●
Data domains						
Custom domain templates	Network provides templates for Product Master and Payer Master domains so you can quickly start using the objects.	20R1.1			●	●
Data model						
Primary address	Two Unique Checkbox settings are updated to help ensure that records always have a primary address.	20R2.0			●	●
Lookup tables	Administrators can now import lookup tables into their Network instance to perform operations and to calculate and validate data.	20R1.1			●	●
Cluster management	This feature now supports IQVIA™ cluster data for Austria.	20R1.1			●	●
Reference data	Spanish (Mexico) is added as a new reference data language.	20R1.1			●	●



			ST	DS	DM	AD
Custom objects						
Removing objects	Custom objects can now be removed from your Network instance.	20R2.0			●	●
US compliance data						
Update frequency	US compliance data is now updated weekly by Veeva OpenData.	20R1.1			●	●
Users						
Menu name change	The Users menu has been renamed to Users & Permissions.	20R2.0				●
Field restrictions	Administrators can assign field-level permissions to specific users and user groups.	20R2.0				●
API access	The API access permission includes a new option to define the systems the user can access.	20R2.0				●
Integrations						
Network Bridge - CRM credentials	The Network Bridge can now run using Salesforce™ credentials that are stored in Veeva CRM.	20R2.0				●
Veeva CRM	Improvements have been made to Network Account Search to help you quickly find accounts.	20R1.1	●			
Network Bridge - Errors	The Job Details page now highlights job issues and provides more granular categories of record-level errors.	20R1.1			●	●
External credentials	Credential requirements are updated to follow a specific URL pattern.	20R1.1				●
Admin settings						
Workflow settings	Administrators can now use Boolean Reference fields to create criteria for workflow settings.	20R1.1				●
Security						
Single sign-on	SAML for Single Sign-on now includes a relay state URL that can be customized for identify providers.	20R1.1				●
API						
Version update	The Network API is updated to v21.0.	20R2.0				Developers
Bulk Export	To prevent timeouts, files can be exported in bulk using the API.	20R2.0				Developers

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

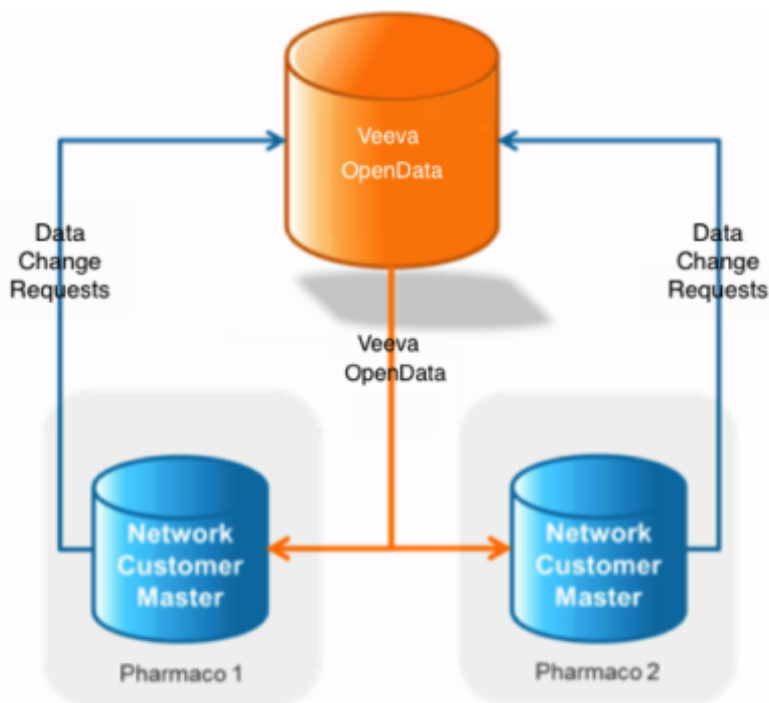


Introduction

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

Veeva OpenData provides identity, demographic, and licensure data about 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.



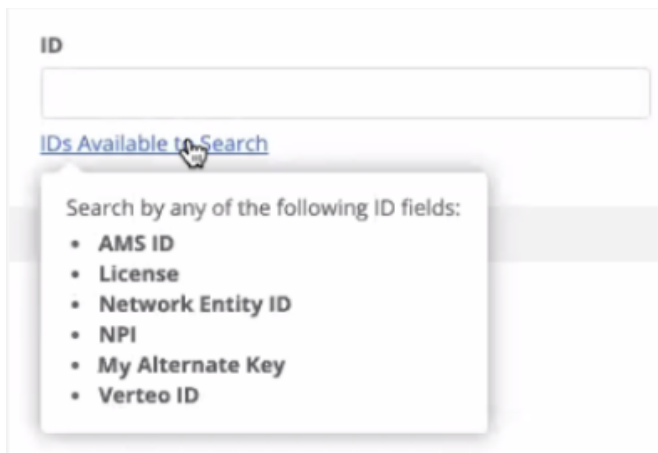
Network widgets

SEARCH BY ALTERNATE KEY

In the search widget, you can now search by alternate key using the **ID** field in the advanced search form. This enhancement supports existing and new alternate keys.

When you click the **IDs available to Search** link, the alternate keys are listed.

In this example, `My Alternate Key` and `Verteo ID` are alternate keys that can be searched for using the **ID** field.



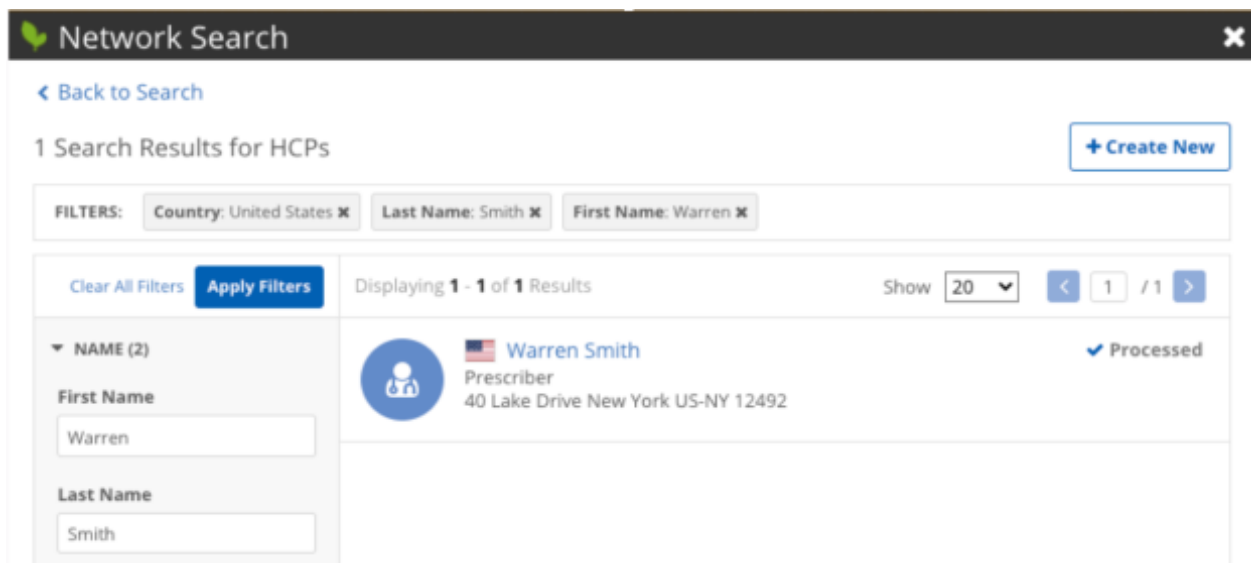
This enhancement is available by default. No changes are required to the configuration; the alternate keys will automatically be available as **ID** fields.

Administrators can add the **ID** field to the advanced search for in the search widget configuration.

NAVIGATION UPDATES

In the search widget, after you submit an add request, clicking the **Back to Search** link now returns you to the search results. Previously, clicking **Back to Search** navigated you to the start page (either basic search or the advanced search form).

This enhancement enables you to easily submit another add request. For example, if you are adding several new records, you can immediately click the **Create New** button on the search results page instead of searching again.

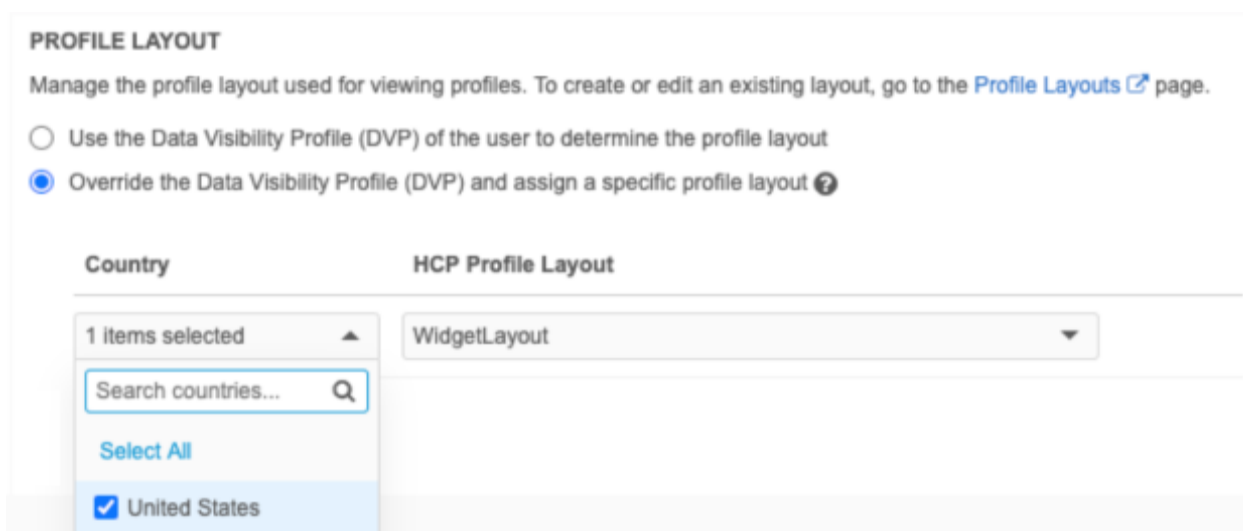


This enhancement is enabled by default for your search widget.

PROFILE LAYOUTS

By default, the Network widgets display record profiles using the profile layout assigned to a user's data visibility profile (DVP). Typically, the layouts assigned to the DVP contain all of the fields in the Network data model. For widget users, displaying all of the fields from the data model might be overwhelming. Administrators can now choose to override this default behavior and assign specific profile layouts for each country to the widget. For example, you can use custom profile layouts to standardize the widget so all widgets users see the same fields or to limit the number of fields so widget users only see the essential fields.

Profile layouts are also used on the Add Request form in the search widget, so using a custom layout means users can have fewer fields to complete when they create a record.





Assign profile layouts to a widget

Customized profile layouts can be assigned to search widgets, profile widgets, and affiliation widgets.

To update the widget configuration to include a specific profile layout:

1. In the admin console, click **System Interfaces > Network Widgets**.
2. Select the widget to open its configuration page.
3. Under the **Profile Layout** heading, choose **Override the Data Visibility Profile (DVP) and assign a specific profile layout** option.

In the profile and affiliation widgets, this is in the **General Settings** section. For the search widget, it is in the **Entity Management** section.

4. In the **Country** list, select all of the countries that the profile layout applies to; for example, it might apply to all European countries. Click **Add Country Layout** to define a layout for more countries.
5. In the **HCP Profile Layout** and **HCO Profile Layout** lists, choose the layout for that object.

If the search widget is configured for only HCPs or only HCOs, a list displays for that object only.

6. **Save** your changes.

When users view records for those countries, the profile layout determines the fields and sections that they see.

AFFILIATION WIDGET TITLE

The affiliation widget homepage title has been changed to **Influence Maps** to more clearly identify it as a tool for visualizing affiliations. Previously, the homepage title was **Health Care Systems**. Additionally, the search field now displays the number of available health care systems available.



This enhancement is enabled by default.

The affiliation widget is available for early adopters. For more information, contact your Veeva representative.



ADVANCED SEARCH

In the **Advanced Search**, several enhancements have been made to the **Country** field to improve your search experience.

- The flag has been added beside each country name to quickly help identify it.
- The **Country** list only displays countries that you have access to through your data visibility profile.
- Your **Country** preference is saved. When you log into the search widget, the country that you used for your previous search is preserved.
- When you filter your results using other fields, the options are determined by the selected country.

Example

If you search for a specific HCP Type for the United States, only the types supported for the US display.

The screenshot displays the 'Network Search' interface. At the top, there are two tabs: 'Health Care Professionals' (selected) and 'Health Care Organizations'. Below the tabs, there are input fields for 'First Name' and 'Last Name'. A dropdown menu for 'HCP Type' is open, showing a search bar and a list of options: 'Animal Health', 'Business Professional', 'Non-Prescribing Health Care Professional', 'Prescriber', 'Resident', and 'Student'. The 'Student' option is highlighted. To the right of the HCP Type dropdown, there are dropdown menus for 'State/Province' and 'Country'. The 'Country' dropdown is set to 'United States' with a flag icon. At the bottom right, there are buttons for 'Clear All Filters' and 'Search'.



CUSTOM KEYS

Network widgets now support creating custom keys that are cross references to the source ID. Previously, custom keys could be created to track the systems that have downloaded records. Now, a separate custom key can be created that includes the cross reference ID (for example, the Salesforce Account ID).

The screenshot shows a user profile for Alan Quartermaine. The profile includes a name with a star icon, a full address (123 E Main St Lansdale PA 19446), HCP type (Prescriber), and primary specialty (Allergy). Under 'SOURCE KEYS', it lists 'Customer_Owned-ServiceCloud, ServiceCloud'. A pop-up window shows a table with the following data:

Source	Item Type
ServiceCloud	HCP
Value	Status
0016A00000nB2nU	Active

The pop-up also shows 'ServiceCloud:HCP:0016A00000nB2nU:Active' at the top and '1 of 1' at the bottom right.

Create custom keys

Web developers can associate custom keys to a record by calling a method during the select event from the widget. The select event is fired when users download a record.

MethodName	associateCustomKey (vid__v, custom_key_source_type, custom_key_item_type, custom_key_value, system_name)
Parameters	<ul style="list-style-type: none"> • vid__v (required) • custom_key_source_type (required) • custom_key_item_type (required) • custom_key_value (required) • system_name (optional)
Return	<p>The following events are fired to indicate whether the associate key call was successful or not:</p> <ul style="list-style-type: none"> • veeva-network:<widgetName>:associate-custom-key-failed • veeva-network:<widgetName>:associate-custom-key-succeeded

This method creates a custom key on the record that is specified in the VID key. The custom key will be created as soon as the user downloads the record, firing the select method.



Example

```

<veeva-network-search-widget
  id="searchWidget"
  widget-name="DefinedSearchWidget"
  ...></veeva-network-search-widget>

<script type="text/javascript">
  const widgetName = 'DefinedSearchWidget';

  // store a reference to the search widget element for event handling
  // and access to custom element's public API
  const searchWidgetEl = document.getElementById('searchWidget');

  // add the event listener for this widget's `select` event
  searchWidgetEl.addEventListener(`veeva-network:${widgetName}:select`, (ev) =>
  {
    // get a reference to this `select`-ed record's `vid_v` value
    const vid_v = ev.detail.entity.entityId;

    // define alternative custom key format
    const custom_key_source_type = 'SOURCE_TYPE';
    const custom_key_item_type = 'ITEM_TYPE';
    const custom_key_value = 'VALUE';
    const system_name = 'SYSTEM_NAME';

    // use custom elements' `associateCustomKey` public API method
    searchWidgetEl.associateCustomKey(
      vid_v,
      custom_key_source_type,
      custom_key_item_type,
      custom_key_value,
      system_name
    );
  });

  // add the succeeded event listener for the emitted `associateCustomKey`
  request
  searchWidgetEl.addEventListener(`veeva-network:${widgetName}:associate-custom-
  key-succeeded`, (ev) => {
    // handle success case here
  });

  // add the failed event listener for the emitted `associateCustomKey` request
  searchWidgetEl.addEventListener(`veeva-network:${widgetName}:associate-custom-
  key-failed`, (ev) => {
    const errors = ev.detail.errors;
    // handle error case here
  });
</script>

```



FILTER PARENT HCOs

The search widget and profile widget can now filter the parent HCOs that display to users. Using a preset filter in the widget code, you can define the parent HCOs that are relevant to your business. Only the filtered parent affiliations will display in search results and on record profiles. Currently, all parent HCOs associated with a record display.

Adding the preset filter to the widget

Web developers can add the parent HCO preset filter to the widget code that is automatically generated from the widget configuration.

Requirements

- The preset filter uses Network's reference codes; reference aliases are not supported.
- The fields must have the `hco.` prefix.

Example filter

```
phco-preset-filter="hco.hco_type__v=11:98,11:2&hco.hco_status__v=A">
```

When this preset filter is applied, only active HCOs that have the Hospital Pharmacy (11:2) or Other Pharmacy (11:98) HCO type display in the widget.

Add this preset filter to the generated widget code that is embedded in your internal application.

```
<veeva-network-profile-widget  
  widget-name="ServiceCloud"  
  auth-domain="my.veevanetwork.com"  
  widget-id="NTE00zs7c2Vydm1jZWNSb3VkX19j"  
  phco-preset-filter="hco.hco_type__v=11:98,11:2&hco.hco_status__v=A">  
</veeva-network-profile-widget>
```

Profile and DCR widget

Using the parent HCO preset filter determines the parent affiliations that display on the record in the profile widget. When the preset filter is applied to the DCR widget, users can only add or update a parent affiliation that matches the defined criteria.



Search widget

When the parent HCO preset filter is used in the search widget, the parent HCOs are filtered when users are adding a new parent HCO in the add request.

The search widget already supports a general preset filter. If both the preset filter and the parent HCO preset filter exist, the parent HCO filter will be used.

Example - Viewing affiliations

Create a preset filter for the search widget so it displays only parent HCOs that are active health systems.

The HCO Type reference code for Organization, Health System is 4:37.

Original record in Network UI

Note that John is connected to several HCOs that vary from Hospitals, Clinics, Departments, and Health Systems.

John Moreyra ☆
FULL ADDRESS 1 Robert Wood Johnson Pl New Brunswick NJ 08901-1928
 Prescriber, Interventional Cardiology

- Primary Information
- Addresses
- Parent Affiliations
- Email Sources
- E-Contacts
- External Identifiers
- Licenses
- Educational Information
- Personal Information
- Custom Fields
- Record Information

▼ Parent Affiliations (7)

Bristol Myers Squibb Childrens Hospital [↗](#)

1 Robert Wood Johnson Pl New Brunswick NJ 08901-1928

HIERARCHY TYPE Individual to Organization Affiliation

RELATIONSHIP TYPE Provider to Hospital via GLID Match

Robert Wood Johnson University Hospital [↗](#)

1 Robert Wood Johnson Pl New Brunswick NJ 08901-1928

HIERARCHY TYPE Individual to Organization Affiliation

RELATIONSHIP TYPE Provider to Hospital via GLID Match

Robert Wood Johnson University of Medicine and Dentistry [↗](#)

125 Paterson St Ste 6140 New Brunswick New Jersey 08901-1962 United States

HIERARCHY TYPE Individual to Organization Affiliation

RELATIONSHIP TYPE AMA Group Practice to Provider

Rutgers RWJ Cardiology [↗](#)

125 Paterson St Ste 5200 New Brunswick NJ 08901-1962

HIERARCHY TYPE Individual to Organization Affiliation

RELATIONSHIP TYPE Provider to Account with Address Match (Suite)

Rutgers RWJ Hematology Oncology [↗](#)

125 Paterson St Ste 5200 New Brunswick New Jersey 08901-1962 United States

HIERARCHY TYPE Individual to Organization Affiliation

RELATIONSHIP TYPE Provider to Account with Address Match (Suite)



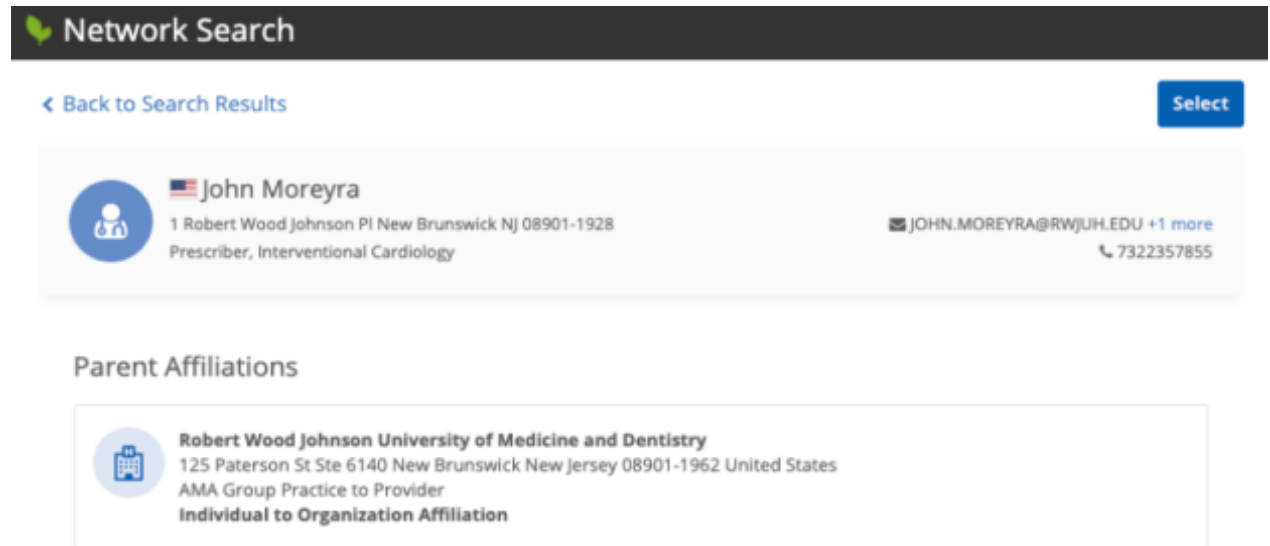
However, when viewing profiles in the search widget, you want to see affiliations only to health systems.

In the widget code, add a preset filter for parent HCOs that are active health systems (the HCO Type reference code for Organization, Health System is 4:37).

```
<veeva-network-search-widget
  widget-name="ServiceCloud"
  auth-domain="my.veevanetwork.com"
  widget-id="NTE00zs7c2Vydm1jZWNSb3VkX19j"
  phco-preset-filter="hco.hco_type__v=4:37&hco.hco_status__v=A">
</veeva-network-search-widget>
```

Filtered record in widget profile

After the preset filter is applied, John's record displays only the parent HCOs that are active health systems.



Example - Adding affiliations

When the same preset filter is applied, a user creating a new affiliation can only create the affiliation to a health system. Other types of HCOs are not available in the **Corporate Name** field.



Parent Affiliations

New Affiliation ✕

Corporate Name *
rober

Hierarchy Type
-

Parent Type
-

Primary Relationship?
-

Status
Active

Robert Wood Johnson University of Medicine and Dentistry
125 Paterson St Ste 6140 New Brunswick New Jersey 08901-1962 United States

Select event

When a user downloads a record from the search widget, the JSON will show only those parent HCOs that matched the criteria in your parent HCO preset filter.

Audit

Administrators can view the parent HCO preset filter in the Search Audit History (**Logs**).

Retrieve entity API

The Retrieve API is updated to support the parent HCO filter. Similar to the Search API, this will filter the parent HCO blocks. The `hco.` prefix is supported for this filter.

Sample request

```
https://verteo.veevanetwork.com/api/v21.0/entity/Network:Entity:260904742618661888?parenthcofilters=hco.specialty_1__v:CD&hco.hco_type__v:4:4
```



Profiles

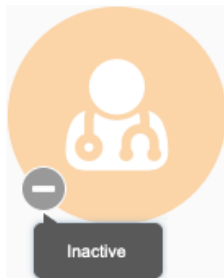
OBJECT ICON BADGES

You can now more easily identify information about the object from the badge on the object icon. Object icons contain information about the record; for example, the record state, the record status, if the HCP has opted-out, or if the record is a candidate record. When you hover your cursor over the badge, the tooltip clearly summarizes the badge information.

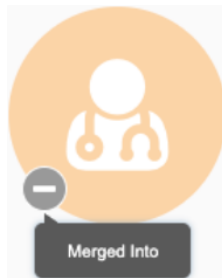
Example

The **Inactive** badge tooltip is updated to display *Merged Into* if the record is the losing record in a merge. Previously, the tooltip displayed *Inactive* for merge losers.

Previous tooltip



Updated tooltip



This enhancement is enabled by default in your Network instance wherever icon badges are used. For more information, see the [Object icon badges](#) topic in the *Veeva Network Online Help*.

Reports

JOB DETAILS

The Folder/ZIP File information that is defined in subscriptions is now included in the Job Details table for reporting. Data managers and administrators can now report on the information to know that the correct files were processed for the job.

Report Results (9 records) Download Report View Full Screen

JOB TYPE	SUBSCRIPTION	START TIME	END TIME	OUTCOME	STARTED BY	HCPs PROCESSED	HCOS PROCESSED	FOLDER / ZIP FILE
source	cs_import_v_2	2020-07-02 10:27:29	2020-07-02 10:27:51	COMPLETE	admin@network.com	100	100	cs_00000000_0D00467B74D7065F.zip
target	test	2020-07-02 11:00:40	2020-07-02 11:00:40	COMPLETE	admin@network.com	201	200	NOALIAS_ALL_0D00469F12E3065F__E
source	sourceSubscriptionA	2020-07-02 11:05:22	2020-07-02 11:05:24	COMPLETE	admin@network.com	1	0	thirdPartySystem
source	cs_import_v	2020-07-02 10:21:57	2020-07-02 10:26:51	COMPLETE	admin@network.com	100	100	cs_00000000_0D00467B5E01065F.zip

This enhancement is enabled by default in your Network instance for all source subscription, target subscription, and Veeva OpenData subscription jobs. Data will start being tracked in the field for this release; historical data will not be loaded.



Source subscriptions

SOURCE SUBSCRIPTION WIZARD

Network now provides a wizard to simplify the process of creating a source subscription. Using a sample file of data, the wizard guides you through the steps to define the advanced properties, field normalization, and model map. At the end of the wizard, the classic subscription configuration page opens so you can continue the setup by defining match rules, Network expression rules, and so on.

Create Source Subscription Cancel Switch to Classic Mode Save & Continue

1 Define Subscription 2 Define File Format 3 Define Objects 4 Select Keys 5 Map Fields

Subscription Name *
CRM_HCP

Does your file contain third party data? *
(Example: data licensed from IMS/IQVIA)
 Yes
 No

Source System *
VCRM1

Countries *
United States X

Description *
Subscription to load HCPs from CRM

Upload Sample Files *

- Upload sample source subscription files to easily map those fields to Veeva Network Fields.
- Only the first 50 records will be read. The smaller your sample file, the faster this step will be.
- Your real subscription files will **still need to be placed on the Veeva FTP server.**

Drag sample files here (.csv, .txt, .xlsx, .gz, .tgz, or .zip)
or
Upload Sample Files

This feature is enabled by default in your Network instance.



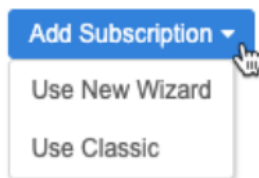
Prerequisite

Before you begin the wizard, create one or more sample files of the data you will load using the subscription. These files are typically much smaller than you would use for the data load; the maximum file size is 30MB. Only the first 50 rows of each file are read.

Add a subscription

To create a subscription using the wizard:

1. In the Admin console, click **System Interfaces > Source Subscriptions**.
2. On the Source Subscriptions page, click **Add Subscription**.
3. Choose **Use New Wizard** from the list.



Define subscription

The new source subscription wizard displays.

You can click **Switch to Classic Mode** to go to the classic subscription configuration page. If you choose to stay in the wizard, the option to **Switch to Classic Mode** is not available after you save your changes on this tab. When you complete the wizard, the classic subscription page opens so you can continue the setup.

On the **Define Subscription** tab, provide the following information:

1. **Subscription Name** - Type a unique name.
2. **Third party data** - Indicate if the file that you are uploading contains third party data. If you choose **Yes**, confirm that you have a TPA in place so Veeva can receive the data.
3. **Source System** - Choose the source that is providing the data. Sources are defined in **System Interfaces > Systems**.
4. **Countries** - Choose the countries that the subscription data applies to. The countries that you select determine the field values that are available throughout the wizard.
5. **Description** - Provide some information about the subscription.
6. **Upload Sample Files** - Drag your sample files to the box or click **Upload Sample File** to choose it from your local computer.

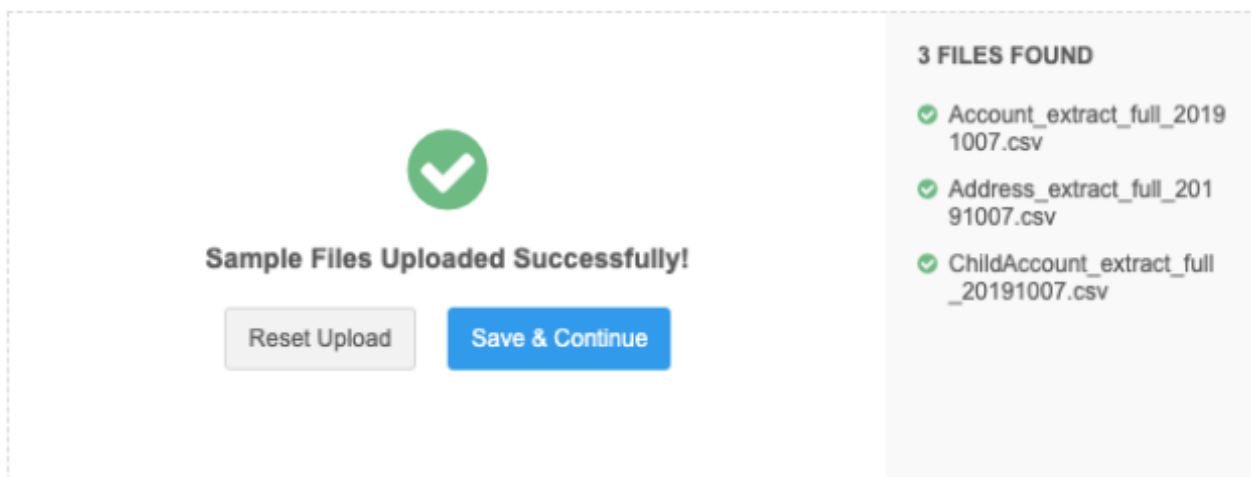
The file is scanned and validated when it is being uploaded. If any issues are found, warnings or a failed message displays.



The upload will fail if any of the following issues are found:

- **Invalid file format** - The file format is not supported. Files must be in .csv, .txt, .xlsx, .gz, .tgz, or .zip format.
- **Cannot process file** - The file is not formatted correctly.
- **Something went wrong** - An unknown issue occurred.
- **File size limit exceeded** - The file size maximum is 30MB.

7. When the upload is successful, the files display. Click **Save & Continue**.



If you mistakenly loaded a file, click **Reset Upload** to choose your files again.

Draft mode

The subscription is now created in draft mode. If you navigate away from the wizard or your user session times out, the draft will be saved. You can return to it from the Source Subscriptions page.

Source Subscriptions Add Subscription					
Search subscriptions <input type="text"/>					
<input type="checkbox"/> Show Disabled Subscriptions (2) <input checked="" type="checkbox"/> Show Incomplete Subscriptions (1)					
NAME ▲	DATA SOURCE	SCHEDULE	LAST JOB TIME	LAST JOB STATUS	STATUS
CRM_HCP	VCRM1	No Schedule Set	Configuration Incomplete	No Schedule Set	⚠ Incomplete
VCRM_US	VCRM1	Manual			✔ Enabled



Tab options

Each wizard tab contains the following buttons:

- **Save & Continue** - Saves your changes and opens the next tab.
- **Back** - Return to the previous tab. Any changes that you made on the current tab could be lost. For example, if you are on Step 3 and click **Back**, the information on Step 3 could be lost, but the information on Step 2 tab is preserved.
- **Cancel** - The draft will be removed from your Network instance.

Define file format

Each tab displays the files that you have uploaded in the left pane.

Define the format for each file.

1. **File name prefix on the FTP server** - The prefix of the file that you will regularly use for this subscription. For example, the file name might change to indicate a date but the beginning of the file name will always be the same.

The field is automatically populated with the prefix of the file that you loaded. Edit the prefix if this is not correct for future files. The file name must be unique; the subscription cannot contain multiple files with the same name.

2. **File Format** - Indicate how the fields in the file are separated. Choose **Fixed Length** or **Delimited**. **Delimited** is selected by default.
 - If you choose **Fixed Length**, type the allowed character lengths for each column into the **Fixed Length Widths** field.
 - If you choose **Delimited**, Network tries to identify how the file is formatted. Ensure that the following settings are correct:
 - **Delimiter** - Identify how the data in the file is separated.
 - **File Text Qualifier** - The characters that identify separate fields.

Note: If you uploaded an .xlsx file, these fields do not display. Network automatically identifies the format.

3. **Headers** - Confirm if your file includes headers. If you choose **No**, type the headers that should be used in the field below. Use the following format `Column_A_Name`, `Column_B_Name`, `Column_C_Name`, and so on.

A preview of the file displays in the format that you identified.



File Name Definition

Filename prefix on the FTP server *
Provide the filename or use a prefix and wildcard for recurring files

File Format Definition

File Format:

Delimiter:

File Text Qualifier:

Does this file have headers? *

Yes

No

File Preview

ID	NAME	LASTNAME	FIRSTNAME	SALUTATION	PHONE	FAX	ISPERSONACCOU
001F000000wkqUQIAY	Jryna Toroshchyna	Toroshchyna	Jryna	Dr.			TRUE
001F000000tSH2UIAW	Natasha Leighl	Leighl	Natasha	Dr.	(416) 946-4645	(416) 946-6546	TRUE
001F000000tSH2VIAW	Dianne Zawisza	Zawisza	Dianne		(416) 946-2913	(416) 946-2225	TRUE
001F000000tSH2WIAW	Maggie Sawczak	Sawczak	Maggie		(416) 946-4501	(416) 946-4589	TRUE
001F000000tSH2XIAW	Belling Leung	Leung	Belling		(416) 946-4501	(416) 946-2394	TRUE
001F000000tSH2YIAW	Jeff Doi	Doi	Jeff		(416) 946-4501	(416) 946-2394	TRUE

4. Click the next file in the left pane to define its format.
5. When each file format has been defined, click **Save & Continue**.

Define objects

On this tab, identify the objects and how they are organized in your files. These settings are used so Network knows how to extract and model the data in each file to load it.

Supported object types for each file

In the wizard, each file can contain a maximum of three objects. Additional objects can be added in the classic subscription configuration. An object cannot be in more than one file.

The following combination of objects is supported for each file:

- 1 main object and 1 or 2 sub-objects
- 2 main objects and 1 sub-object
- 1 main object and 1 or 2 relationship objects
- 2 main objects and 1 relationship object
- 1, 2, or 3 main objects
- 1, 2, or 3 sub-objects
- 1, 2, or 3 relationship objects



Defining objects and their file structure

To identify the objects in each file, provide the following information:

1. **Objects** - Select each object that is included in your file. Three objects can be selected.
2. **File structure** - If there is more than one object in the file, identify how the objects are organized.
 - **Multiple objects in a single row** - Each row contains the included objects. This structure is available for any supported combination of objects in the file.

Multiple objects in a single row

	HCO	HCP	Address
<input checked="" type="radio"/>			

- **Multiple objects in multiple rows** - Objects are organized by row. This structure is available to choose if the file contains more than one main object or more than one sub-object (no main object) in the file.

Multiple objects in multiple rows

<input checked="" type="radio"/>	HCO		Address
	HCP		Address
	HCO		Address
	HCP		Address

3. **Filtering criteria** - Use filters to skip records from being loaded or to differentiate records if there are multiple objects in the file. If the file is organized with multiple objects in multiple rows, at least one filter criteria must be used so Network knows the criteria to use to differentiate the records on each row.

Example - Skip records from being loaded

Use the filters to tell Network to load the objects if they are HCPs AND they are not from Chicago.



How is the source file structured? *

Multiple objects in a single row

HCP	Address

Multiple objects in multiple rows

Other file structures not available for this configuration

HCP
Address
HCP
Address

Define criteria to load specific records?

Yes
 No

Filtering criteria MUST be filled in to import records.

OBJECTS	COLUMN	CONDITION	VALUE		
HCP, Address	ISPERSONAC... ▼	Equals ▼	TRUE	AND	🗑️
HCP, Address	CITY ▼	Not Equals ▼	CHICAGO		🗑️

[+ Add Condition](#)

The objects are grouped because they are on a single row. Only rows can be filtered; not each object within the row. Sub-objects are never filtered on their own.

If multiple filters are defined, they are treated as an AND condition.

Example - Differentiate objects

If a file has more than one main object in multiple rows, ensure that the file contains a field that can be used to differentiate the objects. For example, if the file contains HCOs and HCPs, a field called `ISPERSONACCOUNT` can identify which row contains an HCO or HCP based on its `TRUE` or `FALSE` value.

Sample file

ID	NAME	LASTNAME	FIRSTNAME	SALUTATION	ISPERSONACCOUNT	PERSONEMAIL	PERSONTITLE
001F000000wkqUQIAY	Jryna Toroshchyna	Toroshchyna	Jryna	Dr.	TRUE	oncodept.toroshchyna@gmail.com	
001F000000tSH2UIAW	Natasha Leighl	Leighl	Natasha	Dr.	TRUE	natasha.leighl@uhn.on.ca	Principal Investigator
001F000000tSH2VIAW	Dianne Zawisza	Zawisza	Dianne		TRUE	dianne.zawisza@uhn.on.ca	CRNC
001F000000tSH2WIAW	Maggie Sawczak	Sawczak	Maggie		TRUE	maggie.sawczak@uhn.on.ca	REG
001F000000ufs4DIAQ	Southampton General Hospital				FALSE		
001F000000ufs4EIAQ	Nottingham University Hospitals				FALSE		
001F000000ufs4FIAQ	University Hospital Olomouc, Clinic of Respiratory Diseases and Turb				FALSE		
001F000000ufs4GIAQ	Gesundheitszentrum Wetterau gGmbH				FALSE		
001F000000ufs4HIAQ	Szent Gyorgy Hospital of Fejer County, Pulmonology Department #1				FALSE		



Use the filtering criteria to tell Network that the field, ISPERSONACCOUNT, is used to differentiate HCOs from HCPs.

How is the source file structured? *

Multiple objects in a single row

HCO	HCP

Multiple objects in multiple rows

HCO			
HCP			
HCO			
HCP			

Define criteria to load specific records?

Yes
 No

Filtering criteria MUST be filled in to import records.

OBJECTS	COLUMN	CONDITION	VALUE
HCO	ISPERSONAC... ▾	Equals ▾	FALSE
+ Add Condition			
HCP	ISPERSONAC... ▾	Equals ▾	TRUE
+ Add Condition			

4. Define these settings for each of the files in the subscription.
5. Click **Save & Continue**.

Select Keys

On this tab, configure the primary keys and foreign keys for each of the objects.



Files that contain main objects

Primary keys for main objects are used to join them to sub-objects and relationship objects.

- Define the **Primary Key** for each object. The field that you choose will be used to create the custom key for each record in Network.

NETWORK OBJECTS	HCO CUSTOM KEY	HCP CUSTOM KEY
HCO, HCP	VCRM1:HCO:ID	VCRM1:HCP:ID

Key Definition

Health Care Organization (HCO)

Primary Key *
Select a primary key for this object. This field will be saved as a custom key.

ID

Health Care Professional (HCP)

Primary Key *
Select a primary key for this object. This field will be saved as a custom key.

ID

After you choose the field, the format for the custom key for that object displays.

Network generates custom keys using the following format: `Source:Item:Value`.

- **Source** - The source system that you chose on the **Define Subscription** tab. For example, VCRM.
- **Item** - The object; for example, HCP.
- **Value** - The value of the field that you chose as the primary key; for example, ID.

When the data is loaded into Network, an HCP record will have a custom key; for example, `VCRM:HCP:47783849`.

Files that contain sub-objects

Define the following settings for each sub-object:

1. **Primary Key** - Choose the field that will be used to create the custom key.
2. **Foreign Key** - Choose the field from the associated main object that will be used to reference (JOIN) the main object.
3. **Foreign Key Objects** - Select the objects that are associated to the sub-object.

If the sub-object is associated to another main object using a different foreign key, click **Add Foreign Key** to define the field for the other objects. Only one foreign key can be created for each main object.

4. **Address Foreign Key (Licenses)** - *Optional*. Select the field on the address to use as the foreign key. This is used when configuring licenses that should be linked to specific address records for compliance. For example, State licenses in the United States must be linked to the address where the HCP practices.



NETWORK OBJECTS	ADDRESS CUSTOM KEY	LICENSE CUSTOM KEY
Address, License	VCRM1:ADDRESS:ID	VCRM1:LICENSE:ID

Key Definition

Address

Primary Key *
Select a primary key for this object. This field will be saved as a custom key.

ID

Foreign Key * ⓘ
ACCOUNT_VOD__C

Foreign Key Object(s) *
The objects that own the sub-object (previously called the controlling objects).

Health Care Organization (HCO) X
Health Care Professional (HCP) X

License

Primary Key *
Select a primary key for this object. This field will be saved as a custom key.

ID

Foreign Key * ⓘ
ACCOUNT_VOD__C

Foreign Key Object(s) *
The objects that own the sub-object (previously called the controlling objects).

Health Care Professional (HCP) X

[+ Add Foreign Key](#)

Address Foreign Key ⓘ
Select the address from license source.

ADDRESS_LINE_2_VOD__C

Files that contain main objects and sub-objects

If a main object and a sub-object are configured in the same file, a foreign key is not required; it will be automatically calculated by Network.

Files that contain relationship objects

Relationship objects associate two main objects, so foreign keys are required for the owner object and related object in the relationship.

1. **Primary Key** - Choose the field that will be used to create the custom key for the relationship object.
2. **Foreign Key** - Choose the field that will be used to reference (JOIN) the owner object in the relationship.
3. **Foreign Key Objects** - Identify the owner object in the relationship.
4. **Foreign Key Related Object Column** - Choose the field that will be used to reference (JOIN) the related object in the relationship.
5. **Foreign Key Related Object** - Identify the related object in the relationship.



NETWORK OBJECTS Parent HCO	PARENTHCO CUSTOM KEY VCRM1:PARENTHCO:ID
-------------------------------	--------------------------------------------

Key Definition

Parent HCO

Primary Key *
Select a primary key for this object. This field will be saved as a custom key.

ID

Foreign Key * ⓘ

PARENT_ACCOUNT_VOD__C

Foreign Key Object(s) *
The objects that own the sub-object (previously called the controlling objects).

Health Care Professional (HCP) X

+ Add Foreign Key

Foreign Key Related Object Column * ⓘ

CHILD_ACCOUNT_VOD__C

Foreign Key Related Object *
The other object in the relationship (previously called non-controlling object).

Health Care Organization (HCO) X

Files that contain main objects and relationship objects

If a main object and a relationship object are configured in the same file, the foreign key for the main object is not required; it will be automatically calculated by Network. The foreign key for the related object is still required.

When you have finished identifying the keys for all of the files, click **Save & Continue**.

Map fields

Map the fields for the objects that you defined in each file to Network fields. If the files do not contain headers, the headers you identified on the **Define File Format** tab are used. This information is used to create the Field Normalization section in the subscription configuration.



View sample data

Three columns of data from your sample file display to help you map the fields. Hover your cursor over the **Sample File Data** section to expand it so you can view the full data.

Fields that do not need to be mapped

In some cases, fields in your file are automatically mapped or do not need to be mapped.

- If the field names in your file match Network fields exactly, the Network fields are automatically populated.
- Network identifies the fields that you have selected as primary and foreign keys on the **Select Keys** tab. Icons for **Primary** and **Foreign Key** fields display beside the **Sample File Field** name (see the **Legend**). These fields do not need to be mapped.
- Fields that do not map to Network fields can remain unmapped; for example, if you used a field to distinguish HCPs and HCOs for the wizard (ISPERSONACCOUNT), it does not need to be mapped.

Find fields

To quickly find a specific field, type the field name in the search box. You can also use the **Fields** list to filter the **Sample File Field** column to display only **Mapped** or **Unmapped** fields.

Mapping the fields

To map the fields:

- Beside each **Sample File Field**, choose the appropriate **Veeva Network Field** name from the list.

The available fields are filtered for the objects that you defined for the file and the country you defined for the subscription.



Field Mapping

Fields: All fields ▼

Default Values (0)

SAMPLE FILE FIELD	VEEVA NETWORK FIELD	SAMPLE	SAMPLE	SAMPLE FILE DATA
ID	HCP Network Entity ID (vid__v) ✕	001F00C	001F00C	001F0000006SHZVIAW
NAME	HCP Full Name (full_name__v) ✕	Jryna To	Natasha	Dianne Zawisza
LASTNAME	HCP Last Name (last_name__v) ✕	Toroshcl	Leighl	Zawisza
FIRSTNAME	HCP First Name (first_name__v) ✕	Jryna	Natasha	Dianne
SALUTATION	Search Network fields HCP Select All	Dr.	Dr.	
PHONE	<input type="checkbox"/> # of Assigned Patients (count_assigned_patients__v) Only		(416) 94	(416) 946-2913
FAX	<input type="checkbox"/> AMA Do Not Contact? (ama_do_not_contact__v)		(416) 94	(416) 946-2225
ISPERSONACCOUNT	<input type="checkbox"/> AMS ID (ams_id__v)	TRUE	TRUE	TRUE
PERSONEMAIL	<input type="checkbox"/> AOA ID (aoa_id__v)	oncodep natasha, dianne.zawisza@uhn.on.ca		
PERSONTITLE	<input type="checkbox"/> Academic Title (academic_title__v)		Principal	CRNC
	<input type="checkbox"/> Associated with Kaiser? (kaiser__v)			
	<input type="checkbox"/> BIG Number (big_num__v)			
	<input type="checkbox"/> BIG Number 2 (big_num_2__v)			
	<input type="checkbox"/> Birth City (birth_city__v)			

Legend

- 🔑 Primary Key
- 🔗 Foreign Key Related Object
- 🔗 Foreign Key Non-Owner
- ✔ Field Mapped

Show 10 ▼ 1 of 2 < >

Default field values

In case there is no data for a field in the file, you can set default values for any fields for the objects in the file. For example, to ensure that each record has a primary country defined, add the primary country field (primary_country__v) and a value.

Default Fields

✕

FIELD	VALUE	VALUE
HCO	Primary Country (primary_country__v) ▼	United States ▼ ✕
HCP	Primary Country (primary_country__v) ▼	United States ▼ ✕

+ Add additional field

Cancel

Save Changes

When the mapping is complete, click **Save & Continue**.



Important: When the changes are applied, the subscription is created; it is no longer considered a draft. The classic subscription page opens so you can continue configuring the settings and options.

Configure classic subscription settings

When the classic subscription page opens, it is disabled by default. The settings that you configured are passed into the source subscription to populate the file definitions, advanced properties, model map, and field normalization sections.

Continue configuring the subscription by defining match rules, Network expression rules, FTP folder, schedules, and any other settings that should be enabled.

When you are finished, enable the subscription.

For more information about the classic subscription configuration, see [Add a source subscription](#) in the *Veeva Network Online Help*.

Configuration management

Draft subscriptions using the wizard cannot be exported to a target environment.

Logs

Administrators can track updates to subscriptions using the System Audit Log. For traceability and troubleshooting purposes, the logs track each action (create, edit, and delete) that users make in the source subscription wizard.

System Audit History								Export
Date range		To	Object Types	Properties				
2020-07-01		2020-07-02		Select an option	Select an option	<input type="button" value="Get History"/>	<input type="button" value="Reset"/>	
Choose time period...								
EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE	
936826396602270111	2020-07-02 16:07:02 IST	admin@verteo.com	CRM_HCP[147]	Edit	Subscription	subscriptionWizardStep	selectKeys	
936826374485639583	2020-07-02 16:01:24 IST	admin@verteo.com	CRM_HCP[147]	Edit	Subscription	subscriptionWizardStep	defineObjects	
936826298616578463	2020-07-02 15:42:07 IST	admin@verteo.com	CRM_HCP[147]	Edit	Subscription	subscriptionWizardStep	defineFileFormat	
936826278199689631	2020-07-02 15:36:55 IST	admin@verteo.com	CRM_HCP[147]	Edit	Subscription	subscriptionWizardStep	defineFileFormat	
936826276483236255	2020-07-02 15:36:29 IST	admin@verteo.com	CRM_HCP[147]	Edit	Subscription	subscriptionWizardStep	defineFileFormat	
936826243707437471	2020-07-02 15:28:09 IST	admin@verteo.com	CRM_HCP[147]	Create	Subscription	QuintilesIMS_IQVIAPurchase	No	
936826234926137759	2020-07-02 15:25:55 IST	admin@verteo.com	514	Delete	Subscription			
936826234061259167	2020-07-02 15:25:42 IST	admin@verteo.com	Test1[146]	Edit	Subscription	subscriptionWizardStep	defineSubscription	
Displaying 1 to 8 of 8								

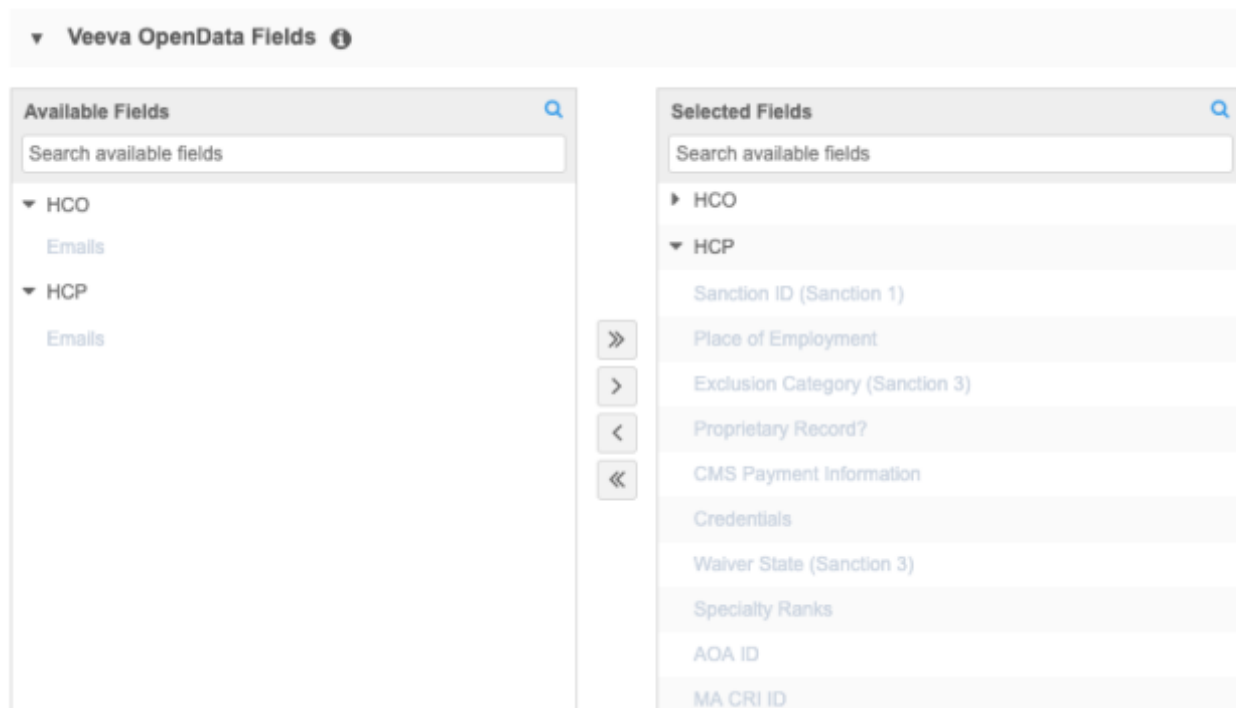


Veeva OpenData subscriptions

OPENDATA FIELDS FOR NEW INSTANCES

All Veeva OpenData fields are now mastered by default in new Network instances. Previously, all OpenData fields were enabled in new instances; now, they will also be mastered by the respective OpenData country. This update simplifies the data model configuration in new instances.

In your Veeva OpenData country subscription, all fields will be included in the **Selected Fields** section.



This enhancement is enabled by default for all new Network instances.

DOWNLOAD RELATED HCOs

Administrators and data managers now have the option of downloading Parent HCOs that are related to the OpenData HCOs and HCPs that are already downloaded to their Network instance. When Veeva OpenData country subscriptions run, parent HCOs are not downloaded; parent HCOs are only downloaded during ad hoc download jobs. This enhancement gives you the option to download those missing Parent HCOs so you have complete relationships in your instance. The count of related HCOs is provided so you will know how many records you can expect to be downloaded.



Additional OpenData Parent HCO records There are additional HCO records in OpenData that are linked to the HCPs and HCOs in your instance but haven't been downloaded yet. Choose whether you want to download them to your instance when you run the OpenData subscription job.

- Download Parent HCOs that are related to OpenData HCPs in my instance ⓘ
- Download Parent HCOs that are related to OpenData HCOs in my instance ⓘ

Estimated number of additional HCOs is: 45

Please note that this number doesn't take into account all the filtering criteria that is applied when downloading additional HCOs:

- a. HCO filters (defined on this page)
- b. Only active and valid HCO records in OpenData are downloaded

The real number of new HCOs that are downloaded may be different.

This enhancement is available in your Network instance by default. You can use these settings in new and existing country subscriptions.

Supported HCOs

The parent HCOs that can be downloaded must meet the following requirements:

- The record state is Valid
- The record status is Active

Note: HCOs that have been previously unsubscribed can be downloaded as a new record if they are related to an existing HCP or HCO.

HCOs will not be downloaded in the following situations:

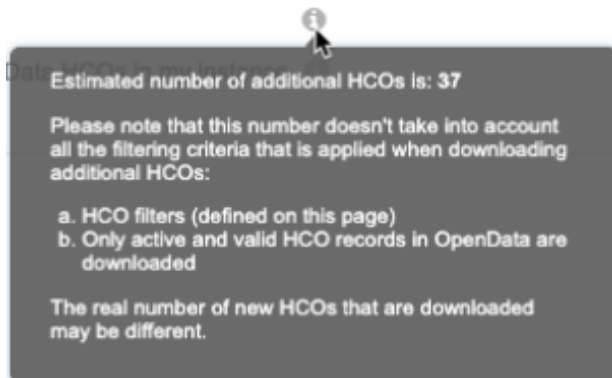
- The related HCP is opted-out
- The country of the HCO is different from the related record

Download missing parent HCOs

A section called **Additional OpenData Parent HCO records** is added to the country subscription. You can choose to download parent HCOs that are related to HCPs and/or HCOs.

Record counts

Network displays the number of parent HCO records that will be downloaded the next time the country subscription runs. Click the **Info** icon beside the setting to see an estimated count of records.



This count doesn't consider any filters that you might have applied to HCOs for this subscription, so after the job runs, the count of records in the Job Details might be different.

Only the first level of a hierarchy is included in the count. If the checkbox for HCOs remains selected, one level of parent HCO will be downloaded each time the job runs until all of the parent HCOs in a hierarchy are downloaded.

After the job runs, the count is reset to zero (0).

About the job

The parent HCOs will be downloaded in a separate job that is triggered after the regular Veeva OpenData country subscription runs. The `Download Related HCOs` job runs once even if you check both the HCP and the HCO options.

Any HCO filters that you have defined in the country subscription are used to filter the parent HCO records, but the setting, **Level of parents to download**, is not used for this job; only one level in the hierarchy is downloaded.

If the subscription does not run because there are no new or updated records to download for that country, the `Download Related HCOs` job does not run (even if there are parent HCOs to be downloaded).

Note: Reporting must be enabled in your Network instance for this job to run (**Settings > General Settings**).

Job Details

On the country subscription's Job Details page, the `Download Related HCOs` job is listed in the **Job Trigger Summary** section. The job is automatically triggered when the country subscription runs; it cannot be managed as a typical job trigger and isn't listed on the List of Job Triggers page (**System Interfaces**).



▼ Job Trigger Summary

Job Initiation CS_IMPORT

Job(s) Triggered

SUBSCRIPTION	JOB ID	STATUS
Download Related HCOs ⓘ	8	FAILED

Email(s) Triggered This job did not trigger any emails.

Click the **Job ID** to view a final count of the HCO records that were downloaded.

Job Details (ID: 8) Cancel Job

▼ Overview

Subscription download_related_hcos__v	Start Time 2020-07-06 21:37:00 IST
Job ID 8	Duration No Value
Percent Complete 21.09%	Current Stage FinalStage
Outcome COMPLETE	Started By PM Admin

▼ Downloaded Records Summary

ENTITY	RECORDS DOWNLOADED
Health Care Organization	80

MERGED ADDRESSES FROM VEEVA OPENDATA

Starting September 25, 2020, Veeva OpenData (US) will begin to periodically run bulk merge jobs if duplicate addresses are discovered in the master instance. Updates to addresses will flow down to your Network instance whenever your OpenData subscription runs or you sync or download records from OpenData. This applies only to your Veeva OpenData US subscriptions.

Merging duplicate addresses keeps your data quality high, but it can impact your data depending on the Network features that you use for your business processes. Review the potential impacts and methods of preserving your data.



Standard bulk merge behavior

During a bulk address merge, Network automatically performs these actions to preserve your data:

- **Record state** - The state of the losing address changes to `Merged_Into`.
- **Custom keys** - Keys from the losing address are moved to the winning address (so you have a reference to the losing record).

This means that the winning address will have two active custom keys.

- **Custom fields** - Fields will go through survivorship.

If custom merge rules are defined for a field, they determine survivorship on the winning address; otherwise, source survivorship is used to determine the value on the winning address. String fields (not supported for custom merge rules) always go through source survivorship.

- **Licenses** - Any licenses on the losing address are redirected to the winning address.

Merge behavior that can impact data

There can be some unintended impact to your data after a merge depending on the Network features that you use.

The following behavior can occur:

- **Custom field value survivorship** - Source survivorship determines the values on the winning record, so specific values can be lost if custom merge rules are not defined for the fields.
- **Primary address moves** - Depending on your primary address configuration, the primary will be updated to the deduplicated winning address.
- **Inherited addresses become inactive** - An existing locally managed copied address that points to a `Merged_Into` address will be unsynced (disqualified) and inactivated.
- **Unsynced inherited addresses remain unsynced** - If you make changes to a copied Veeva OpenData address (so the address becomes unsynced from the HCO) and Veeva OpenData merges that address into a winning address, when you sync with OpenData to get updates, the copied address remains unsynced. It cannot be synced again because the parent address is now a `Merged_Into` address.

For more details, review the following sections.

Custom fields

When addresses are merged, source survivorship determines the field values that are retained on the winning record. You might have specific values (from either the winning or losing record) that you want to be retained. For example, if you have a custom field to track shipping address for an HCP, you might want the reference value, `Y` (Yes/True), retained over other values (False or Unknown) so your operations teams know where to send samples for that HCP. When addresses are merged, source survivorship determines the value, so the `Y` value could be lost.



Example

	Losing Address	Winning Address	After Merge
Custom field and value	Shipping Address = Yes/True	Shipping Address = Unknown	
Using Source survivorship	Source Ranking = 3	Source Ranking = 1	Shipping Address = Unknown
Using Custom Merge Rule	Reference Code Ranking = 1	Reference Code Ranking = 3	Shipping Address = Yes/True

Use custom merge rules to ensure that field values are not lost or overwritten during the merge. Custom merge rules can be created so you can define the condition to keep specific values.

Condition options

Field Type	Winning Condition Options
Integer/Decimal Number	Highest Value Wins / Lowest Value Wins
Date	Most Recent Wins / Oldest Value Wins
Checkbox (reference with Boolean Reference list)	True Wins / False Wins
Reference Fields	Upload the list of fields. Rank the reference codes for survivorship and then upload the edited file back into Network.

Note: Custom merge rules are not supported for Text type fields. Text fields will go through source survivorship.

For more information, see [Custom merge rules](#) in the *Veeva Network Online Help*.

Custom primary field

Primary custom fields are used to designate a "best" address for specific uses. A primary custom field can use one of the following configurations:

- **Network Calculated** - Network automatically determines the primary based on specific criteria.
- **Unique Checkbox** - The primary does not move unless you move it. Additional options are available for allowing Network to calculate the primary for specific conditions.

Primary address calculation can initially be populated during a data load or when new records are created and downloaded from Veeva OpenData. Subsequent updates depend on the primary address configuration and can be triggered when records are synced with Veeva OpenData.



Standard primary behavior

In all configurations, if the losing address is primary before the merge, the primary value moves to the winning address. This ensures that the primary is preserved on the merged address. When the primary custom field value is *Yes/True* on the winning record, merging the addresses does not move or change the primary value.

Fields	Before Merge		After Merge	
	Losing Address 423456789012345678	Winning Address 678328123948237162	Losing Address 423456789012345678	Winning Address 678328123948237162
Address Line 1	123 Main St.	123 Main St.	123 Main St.	123 Main St.
Custom Primary	True	False	False	True
Custom Key	CRM123 (active)	CRM456 (active)	CRM123 (inactive)	CRM123 (active) CRM456 (active)
Address Status	Active	Active	Active	Active
Record State	Valid	Valid	Merged_Into	Valid

Primary behavior when primary is on the losing address

Review the tables for each primary configuration type to understand how merging addresses can impact the primary when the primary custom field is *Yes/True* on the losing address.

Network Calculated configuration

Configuration options	Behavior during merge			
	The primary moves to the winning address.			
	Example			
	Field	Losing	Winning	After Merge
	Address 1	123 Main St.	123 Main St.	123 Main St.
	Primary__c	True	False	True



The Unique Checkbox configuration includes options so you can control the behavior of the primary flag.

Unique Checkbox configuration

Configuration options	Behavior during merge																
No options selected	<p>The primary moves to the winning address.</p> <p>Example</p> <table border="1"> <thead> <tr> <th>Field</th> <th>Losing</th> <th>Winning</th> <th>After Merge</th> </tr> </thead> <tbody> <tr> <td>Address 1</td> <td>123 Main St.</td> <td>123 Main St.</td> <td>123 Main St.</td> </tr> <tr> <td>Primary__c</td> <td>True</td> <td>False</td> <td>True</td> </tr> </tbody> </table>	Field	Losing	Winning	After Merge	Address 1	123 Main St.	123 Main St.	123 Main St.	Primary__c	True	False	True				
Field	Losing	Winning	After Merge														
Address 1	123 Main St.	123 Main St.	123 Main St.														
Primary__c	True	False	True														
The record DOES NOT HAVE a primary address	<p>If the losing address was not primary, a primary will be calculated as usual to ensure that the record has a primary address.</p> <p>Example</p> <table border="1"> <thead> <tr> <th>Field</th> <th>Losing</th> <th>Winning</th> <th>After Merge</th> </tr> </thead> <tbody> <tr> <td>Address 1</td> <td>123 Main St.</td> <td>123 Main St.</td> <td>123 Main St.</td> </tr> <tr> <td>Primary__c</td> <td>False</td> <td>False</td> <td>True</td> </tr> </tbody> </table> <p>Note: If the primary is on another address on the record, there is no change to the primary address.</p>	Field	Losing	Winning	After Merge	Address 1	123 Main St.	123 Main St.	123 Main St.	Primary__c	False	False	True				
Field	Losing	Winning	After Merge														
Address 1	123 Main St.	123 Main St.	123 Main St.														
Primary__c	False	False	True														
The status of the primary address is INACTIVE	<p>The primary moves to the winning address. However, if the winning address is inactive, the primary will be recalculated and moved to another address on the record. If there are no other addresses, the record will not have a primary address.</p> <p>Example</p> <table border="1"> <thead> <tr> <th>Field</th> <th>Losing</th> <th>Winning</th> <th>After Merge</th> </tr> </thead> <tbody> <tr> <td>Address 1</td> <td>123 Main St.</td> <td>123 Main St.</td> <td>123 Main St.</td> </tr> <tr> <td>Primary__c</td> <td>True</td> <td>False</td> <td>False (Recalculate new primary)</td> </tr> <tr> <td>Record status</td> <td>Active</td> <td>Inactive</td> <td>Inactive</td> </tr> </tbody> </table> <p>This can impact any business processes that rely on the primary staying on that address, or the record having at least one primary address.</p>	Field	Losing	Winning	After Merge	Address 1	123 Main St.	123 Main St.	123 Main St.	Primary__c	True	False	False (Recalculate new primary)	Record status	Active	Inactive	Inactive
Field	Losing	Winning	After Merge														
Address 1	123 Main St.	123 Main St.	123 Main St.														
Primary__c	True	False	False (Recalculate new primary)														
Record status	Active	Inactive	Inactive														
The record state of the primary address is INVALID or DELETED	<p>Does not apply. An address cannot be merged into an invalid or deleted address.</p>																

For more information about primary custom fields and behavior, see [Primary address](#).



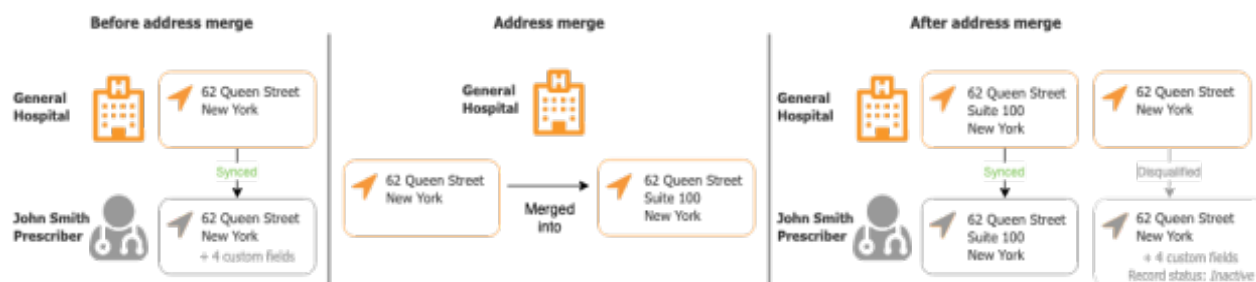
Network address inheritance

Inherited addresses become inactive

Network address inheritance links addresses on parent affiliations to child affiliations to improve the quality of the address data and to simplify address management. When address inheritance is configured, fields are copied from the parent address but custom fields can be populated by local data stewards or source subscriptions.

After addresses are merged on the parent affiliation in OpenData, the existing link between the affiliations is not updated; the losing address is disqualified and becomes inactive. A new link is created to the winning address with a new Network entity ID (VID) if the winning address is not already copied on your Network instance.

Example



Unsynced inherited addresses remain unsynced

After addresses are merged in the Veeva OpenData master instance, an existing unsynced address in your local instance can remain unsynced.

This occurs if you make changes to a copied Veeva OpenData address and then Veeva OpenData merges that address into a winning address. When you sync with OpenData to get updates, your copied address will remain unsynced. It cannot be synced again because the parent address is now a *Merged_Into* address.

Example

You have an HCP (Veeva or locally managed) that is affiliated to an OpenData HCO. Using Network Address Inheritance, you've copied the HCO address down to the HCP.

A change is made to the copied address on the HCP, so the copied address becomes unsynced; the value of the `parent_address_sync__v` field on the copied address is `U` (Unsynced).

Veeva OpenData merges the HCO addresses and the copied address on your HCP is the losing address in the merge. When you sync with OpenData to get updates, the copied address will remain Unsynced. If you try to resync the copied address, it still remains Unsynced because that parent address is now *Merged_Into*.



Veeva CRM considerations

When losing addresses are exported to CRM, they might be deleted if you have the following CRM settings enabled:

- `FILTER_INACTIVE_NETWORK_RECORDS_vod`
- `NETWORK_ADDRESS_DELETION_PROCESS_vod__c`

When addresses are merged in Network, the record state of the losing address changes to `Merged_Into`. Depending on your setting values for these CRM options, addresses that do not have a `Valid` or `Under_Review` record state can be deleted (the custom keys are still moved to the winning address). This means that `Merged_Into` addresses will not display in CRM, but call information associated to the losing address will remain stamped on the call record.

To review the behavior of the setting values, see the [Handling inactive records](#) topic in the *Veeva CRM Online Help*.

Review the field mappings between CRM and Network to ensure that any custom fields in CRM that should be carried over to the winning address are mapped to Network, including the `Primary_vod__c` field. For more details, see [Network field mapping](#) in the *Veeva CRM Online Help*.

Primary addresses

If you maintain primary flags in Veeva CRM by using `Primary_vod__c` and it is not mapped to Network, when addresses are merged and you receive updates through the Network Bridge, Network ensures that the primary address is retained in the following situation:

- The address merge occurs on the same entity (HCP/HCO).
- The losing address has `Primary_vod__c = True`.

In these situations, `Primary_vod__c` is set to `True` on the winning address.

Testing data impact to downstream systems

Using your Sandbox instance, you can test how address merges from OpenData might affect data in your downstream systems. For more information, contact Veeva Support.

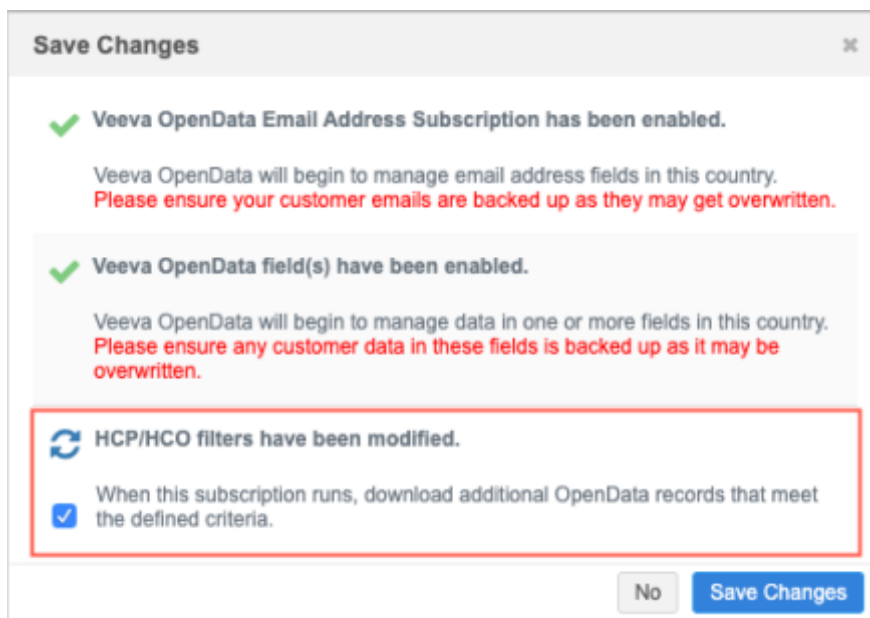


REFRESHING SUBSCRIPTIONS

When you update a subscription to add HCP or HCO filters, you can now choose to download any additional records that meet the new filter criteria the next time the job runs.

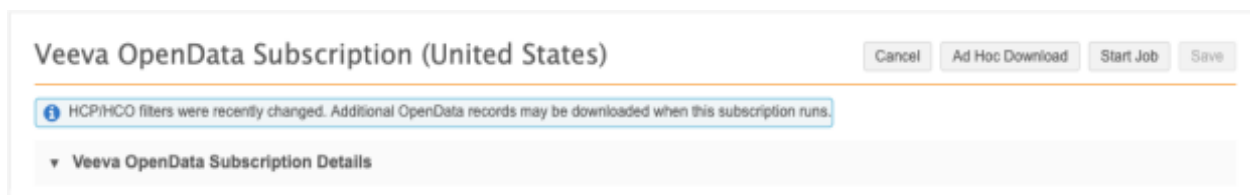
By default, when you add HCP and HCO filters, new records that match the criteria are downloaded only when OpenData makes changes to the record. Now, the next job that runs can include any new records along with updates to existing records.

After you apply new HCP or HCO filters and click **Save**, a pop-up displays to confirm your changes. By default, the option to download additional records is selected. Clear the option if you do not want the next job to include all of the records that meet your new criteria.



Changes that were made to additional subscriptions (for example, HIN data or Email) and any changes to fields are also confirmed in the pop-up.

Before the next job runs, a message displays at the top of the subscription to notify users that the HCP/HCO filters have been changed and additional records may be downloaded.





COUNTRY SUBSCRIPTIONS FOR ALL RECORDS

If you purchase all OpenData records for a particular country and you have specifically requested to have all records downloaded to your instance, the country subscription page now indicates these details.

The subscription is also updated to remove the section for the **Working Set** and the **Health Care Professional** and **Health Care Organization** sections to subscribe to additional records. When you subscribe to have all records downloaded to your Network instance for a particular country, there is no need to maintain a working set or HCO/HCP filters.

You can continue to manage the parent HCOs that are downloaded, additional field level subscriptions (for example, Email and Geo Subdivision), and Veeva OpenData fields.



GEO SUBDIVISION SUBSCRIPTIONS

The Geo Subdivision and Geo Subdivision 2 subscriptions are now available for Russia. These subscriptions contain sales data that is organized into small geographic areas.

If these subscriptions are added to your OpenData subscription for Russia, the following fields are automatically enabled on address object:

- `geo_subdivision__v`
- `geo_subdivision_label__v`
- `geo_subdivision_2__v`
- `geo_subdivision_2_label__v`

For more information, see the [Geo Subdivision](#) data topic in the *Veeva Network Online Help*.

Match against Veeva OpenData

PERFORMANCE IMPROVEMENTS

Performance improvements have been made for source subscription and ad hoc match jobs when large numbers of new records are downloaded from an OpenData master instance. OpenData records are downloaded when the **Match & Download from OpenData** setting is selected in the subscription configuration.

Ad hoc downloads that download numerous records from OpenData will also see improved run times.



Data domains

CUSTOM DOMAIN TEMPLATES

Network now provides custom domain templates for Product Master and Payer Master. The templates are populated with the typical objects required for these business areas. Designing and implementing a data model takes time, so using the templates ensures that the data model is well-designed and enables you to quickly start using the custom objects.

The template is provided by Network, but after it is applied, the data model is customer-owned.

Create a data domain using a template

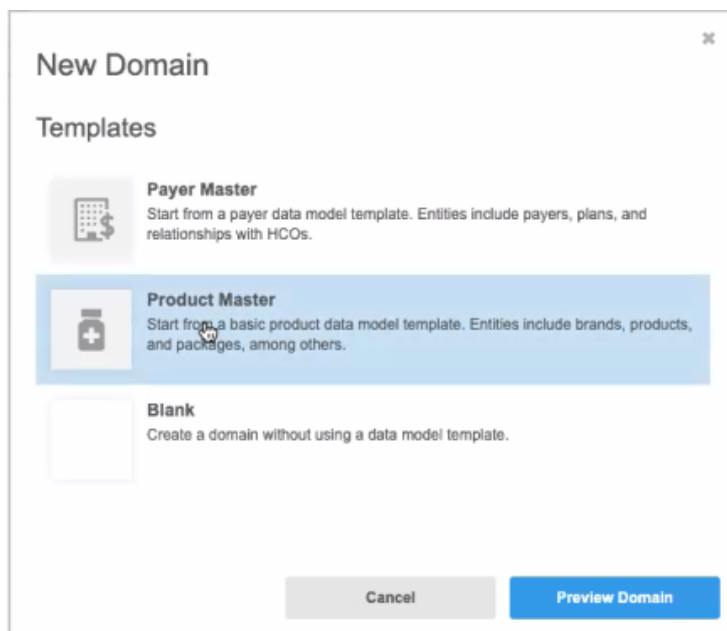
Data domains can be created in Sandbox instances only.

To create a data domain:

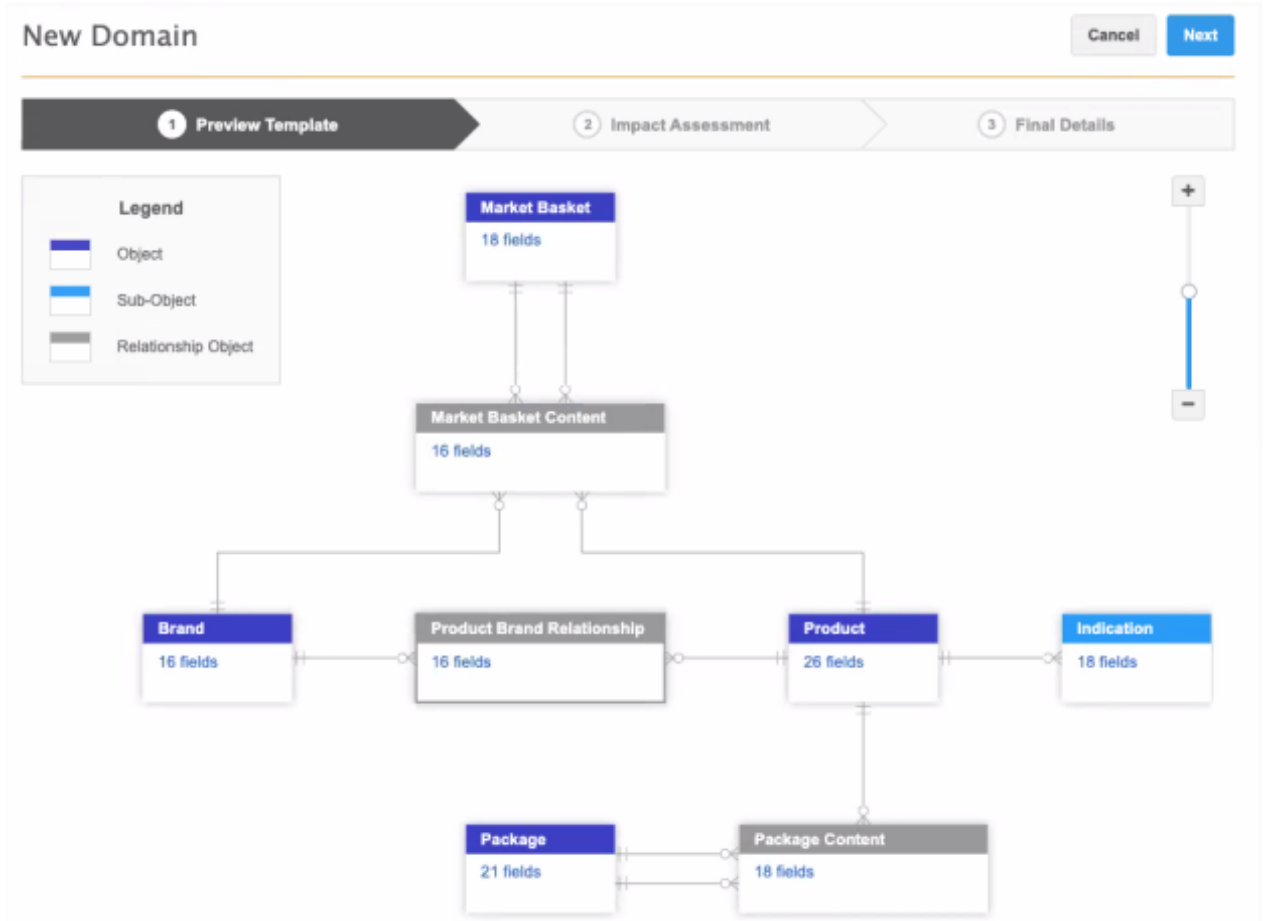
1. In the Admin console, click **Data Model > Data Domains**.
2. Click **New Domain**.
3. In the **New Domain** dialog, select an available template: **Product Master** or **Payer Master**. If the template is already used, it is dimmed and cannot be selected.

You can also choose **Blank** to create a domain without a template. To learn how to create a domain without a template, see [Data domains](#) in the *Veeva Network Online Help*.

When you have selected a template, click **Preview Domain**.



4. The **Preview Template** tab displays the ERD of the data model. Click any of the field links to preview the fields that will be added for each object.



Note: The Payer Master template includes the HCO object and address object. These objects already exist in your Network instance (in the Customer Master domain) so they will not be created, but they display in the ERD for completeness.

5. Click **Next**.
6. On the **Impact Assessment** tab, review the objects and reference types that will be added to your Network instance when the template is applied.



New Domain Cancel **Next**

✔ Preview Template
2 Impact Assessment
3 Final Details

ⓘ When the domain is created, the following changes will be applied to the current data model. You can add additional objects after you apply the template.

▼ Objects

LABEL	NAME	TYPE	FIELDS	CHANGE TO DATA MODEL
Brand	BRAND_V__C	Object	16 fields	✔ Add
Market Basket	MARKETBASKET_V__C	Object	18 fields	✔ Add
Package	PACKAGE_V__C	Object	21 fields	✔ Add
Product	PRODUCT_V__C	Object	26 fields	✔ Add
Indication	INDICATION_V__C	Sub-Object	18 fields	✔ Add
Market Basket Content	MARKETBASKET_CONTENT_V_REL__C	Relationship	16 fields	✔ Add
Package Content	PACKAGE_CONTENT_V_REL__C	Relationship	18 fields	✔ Add
Product Brand Relationship	PRODUCT_BRAND_V_REL__C	Relationship	16 fields	✔ Add

▼ Reference Data

REFERENCE SET	VALUES	CHANGE TO DATA MODEL
BrandVStatus__c	2 values	✔ Add
DosageForm_v__c	157 values	✔ Add

Object names are created under a Veeva namespace using the `_V__C` suffix to ensure that there are no name conflicts with existing objects. Avoid creating any custom object names under the namespace that is reserved for Veeva custom domain templates.

If you previously created an object with the same name as an object in the template, a warning message displays in the **Change to Data Model** column. The template cannot be applied when there is a name conflict. Contact Veeva Support to resolve the issue.



- Click the links in the **Fields** columns to preview the fields that will be added for each object.

NAME	LABEL	TYPE
candidate_record__v	Candidate Record	Checkbox
created_date__v	Created Date	Date and time
record_delta_id__v	Delta ID	Veeva ID
marketbasket_v_effective_date__c	Effective Date	Date (no time)
marketbasket_v_expiry_date__c	Expiry Date	Date (no time)
modified_date__v	Modified Date	Date and time
marketbasket_v_name__c	Name	Text
vid__v	Network Entity ID	Veeva ID

- In the **Reference Data** section, click the links in the **Values** columns to see the values created for the reference data. Some reference sets are created without any reference values so you can add the values that are relevant to your business.
7. Click **Next**.
 8. On the **Final Details** tab, you can customize the data domain by overriding the domain name and description. You can also choose a different icon.

The **Name** and **Description** use the defaults from the template in your defined language.

Data Domains > New Domain

New Domain

DOMAIN

On this page: [Details](#) · [Domain Icon](#)

[Cancel](#) [Create Domain](#)

Preview Template [Impact Assessment](#) **3 Final Details**

Details

Domain Name *

Description *

Domain Icon

You can select the icon that will best represent your object on the object profile page.

Icon Library * [Choose Icon](#)

Icon Preview



9. Click **Create Domain**. In the confirmation pop-up, confirm that you want to create the domain.
10. On the Data Domains page, you can view the progress of the data domain. The template is a configuration package that is imported into your Network instance.

When the domain is created, data model entities (objects, fields, reference types) will be added to your Network instance; these entities will be locally managed and maintained. All of the objects will be enabled by default. Administrators do not need to enable each object.

Next steps

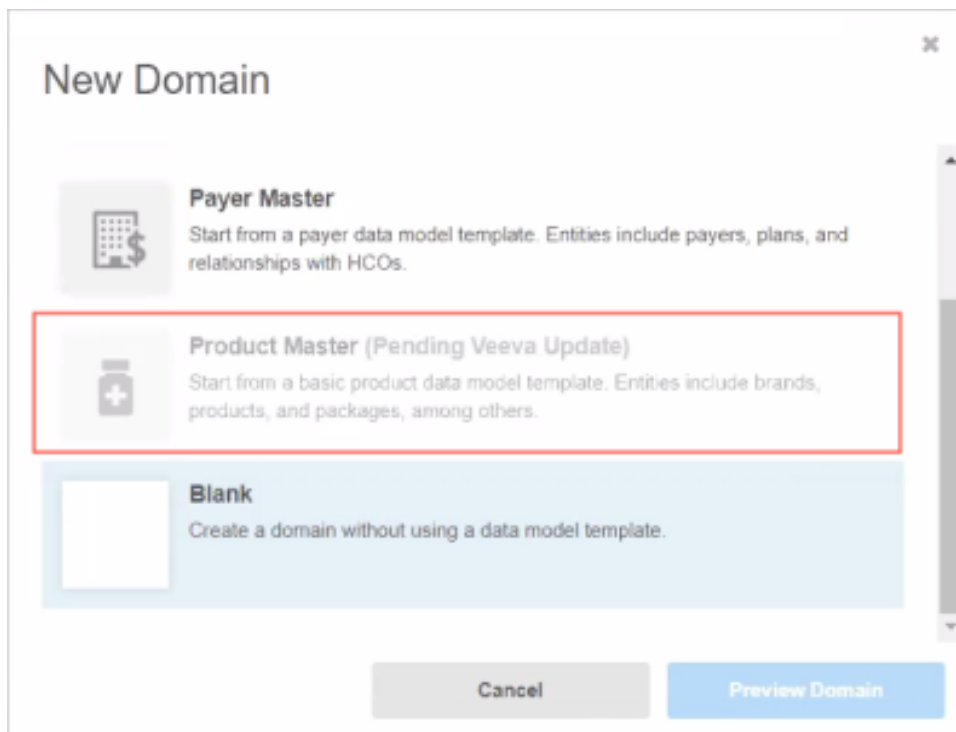
After your data domain and custom objects are created, load data and create profile layouts for the objects. For more information about provisioning custom objects, see [Getting started with custom objects](#) in the *Veeva Network Online Help*.

Template versions

Updated versions of the template can be available when the content in the configuration package is updated for feature enhancements.

When there's a mismatch between the feature version in your Network instance and the version in the template's configuration package, the template cannot be used to create a domain. Only the most recent versions of the template can be used to create a data domain. When your Network instance is updated, the template can be used.

This should only occur for the two weeks between Sandbox and Production releases.





Troubleshooting template issues

If an error occurs and the data domain template is not imported into your Network instance, a message displays on the Data Domains page. The configuration package for the template will display on the Configuration Import page (**Settings > Configuration Import**) so you can investigate the issue.

Data Domains

[New Domain](#)

⚠ There is an unexpected issue with the domain Product. Please refer to the error displayed for the import package signature 515_000000012 on the Configuration Import page.



Customer Master

Objects: Address, HCO, HCP, Licenses, Parent HCO, Study, Patient, Another Object, and 10 more.
Customer master domain. Description would go here. Veeva defined domain. This cannot be deleted.



Product

Objects: Brand, Compound Strength, Compound, Package, Product, Global Product, Local Product, Trade, Trade Location, Identifier, and 11 more.
Product domain. Description would go here.

Note: If the template is successfully imported into your Network instance, the configuration package does not display on the Configuration Import page.

Audit

Administrators can use the System Audit Log to understand which templates were applied in their Network instance. To quickly see the templates, in the **Object** filter list, select **DomainTemplate**.

System Audit History

Date range To Object Types Properties [Get History](#) [Reset](#)

Choose time period... ▾

EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE
936425123676618815	2020-04-22 14:18:03 EDT	system.admin@network.com	product_master_template	Create	DomainTemplate
936425123672752191	2020-04-22 14:18:03 EDT	system.admin@network.com	Template Configuration - pro...	Edit	TemplateConfiguratio
936425123672752191	2020-04-22 14:18:03 EDT	system.admin@network.com	Template Configuration - pro...	Edit	TemplateConfiguratio

Displaying 1 to 3 of 3



Data model

PRIMARY ADDRESS UPDATES

Two of the Unique Checkbox primary address settings are updated to help ensure that records will have a primary address.

▼ Properties

Name ⓘ primary2__c

Effective Version ⓘ N/A

Type ⓘ Primary

Configuration ⓘ Unique Checkbox

When to Calculate Primary Address ⓘ

- The record DOES NOT HAVE a primary address
- The status of the primary address is INACTIVE
 - Recalculate only if there are active addresses on the record
 - The record state of the primary address is INVALID or DELETED

These enhancements are enabled by default in your Network instance.

Updated options

The following options have been updated to prevent records from not having a defined primary.

The record DOES NOT HAVE a primary address

Selecting this setting calculates a primary address if the record does not have one. Previously, if an incoming record had a primary address field value that was defined as *No/False*, a primary would not be calculated because input data overrode the calculation setting. Now, if the primary value is any value other than *Yes/True*, a primary will be calculated.

Important: If you want to retain the previous behavior for your Network instance, contact Veeva Support.



The status of the primary address is INACTIVE

This setting recalculates a primary if the current primary address is inactivated. If there are no active addresses on the record, a primary is not calculated so the record will not have a primary address. Now, if users select this setting, they can choose a new option: **Recalculate only if there are active addresses on the record**.

This new option ensures that Network only recalculates the primary if there are active addresses on the record. If there are no active addresses, Network keeps the primary on the address that was last active.

More information

For more details and primary address scenarios, see [Unique Checkbox with primary address calculation options](#) in the *Veeva Network Online Help*.

LOOKUP TABLES

Administrators and data managers can now import lookup tables into their Network instance to perform operations and to calculate or validate data. These multi-value reference lookups are stored in Network so you can cross-reference your object data. Lookup tables can be used in Network expressions for source subscriptions and data model fields.

The screenshot shows the 'Lookup Tables' management interface. At the top right is a 'Create Lookup Table' button. Below the header is a search bar and a 'Sort by Name' dropdown menu. A checkbox for 'Show only created/modified by me' is present, along with a 'Show 10' dropdown and a pagination indicator '1 of 1'. The main area contains three table entries:

Table Name	Description	Created By	Modified By	Actions
address_data__t	Data to be used for address verification.	Burn, Linda (linda.burn)	Burn, Linda (linda.burn)	Download, Re-Upload, Delete
germany_brick_mapping_v1__t	My Germany Brick Book - V1	D'Ambrogio, Christina (christina.dm)	D'Ambrogio, Christina (christina.dm)	Download, Re-Upload, Delete
ireland_brick_mapping__t	Ireland Custom Cluster (Brick) Calculation	D'Ambrogio, Christina (christina.dm)	D'Ambrogio, Christina (christina.dm)	Download, Re-Upload, Delete



Lookup functions

Lookup tables are used in Network Expressions (NEX rules). The lookup functions can be used in field calculations and source subscriptions. For example, you might want to use a lookup table to populate a field value or to evaluate data to produce a warning or reject a record. You can use the NEX rule to fail a subscription if a defined number of records don't comply with the validation.

Note: The fields that are used in the function must be related to the object; for example, do not include an HCP field for an address lookup.

Use the following functions in NEX rules to reference a lookup table:

LOOKUP()

Use this function to look for a value from a range (one or multiple columns in a row) and then returns a value in the same row.

Syntax

```
LOOKUP('lookup_table_name', 'column_name', <lookup_column_1>:  
<expression1>, <lookup_column_2>: <expression2>)
```

LOOKUPVALIDATE()

Use this function to look for a value from a range (one or multiple columns in a row) and then returns TRUE if value found, FALSE otherwise.

Syntax

```
LOOKUPVALIDATE('lookup_table_name', <lookup_column_1>: <expression1>,  
<lookup_column_2>: <expression2>)
```

TABLEEXIST()

This function checks for the existence of a lookup table and returns TRUE if exists, FALSE otherwise.

Syntax

```
TABLEEXIST('lookup_table_name')
```



LOGDETAILWARN()

A warning that displays in the job history for any record failing certain criteria.

Note that this is not specifically for lookups. It can be used for other NEX functions also, for example, REJECT().

Syntax

```
[
  "IF(LOOKUPVALIDATE('addressdata__t.csv', postal_code__v:
UPPERCASE('a12b3c'), locality__v:'springfield', administrative_area__v:
concat('NY', 'C')), LOGDETAILWARN('The address combination is incorrect'))"
]
```

Lookup examples - source subscriptions

Example 1 - LOOKUPVALIDATE()

In a source subscription, create a transformation rule that uses a lookup table to validate address data. If the addresses being loaded cannot be verified using the cross-referenced data in the lookup table, create an error.

RULE POINT	FILE / ENTITY	RULE
Transformation	Address	<pre>["IF(!LOOKUPVALIDATE('addressdata__t', postal_code__v: postal_code__v, locality__v: locality__v, administrative_area__v: administrative_area__v), LOGDETAILWARN('The address combination is incorrect'))"]</pre>

```
[
  "IF(!LOOKUPVALIDATE('addressdata__t', postal_code__v: postal_code__v,
locality__v: locality__v, administrative_area__v: administrative_area__v),
LOGDETAILWARN('The address combination is incorrect'))"
]
```



Example 2 - LOOKUP()

Create a transformation rule to query the value of a specific column in the lookup table by providing multiple parameters to find the desired combination in the table. For example, create a lookup for cluster codes.

Network Expression Rules ?		
RULE POINT	FILE / ENTITY	RULE
Transformation ▼	Address ▼	["address_text__c = LOOKUP('addressdata__t', 'country__v', postal_code__v: postal_code__v, locality__v: locality__v, administrative_area__v: administrative_area__v)"]

```
[
  "address_text__c = LOOKUP('addressdata__t', 'country__v', postal_code__v:
postal_code__v, locality__v: locality__v, administrative_area__v:
administrative_area__v)"
]
```

Example 3 - TABLEEXISTS()

Create a feed acceptance rule that verifies that the lookup table exists and if the table is empty. Fail the data load if the lookup table or data is missing.

Network Expression Rules ?		
RULE POINT	FILE / ENTITY	RULE
Feed Acceptance ⇅	FEED ⇅	["IF(!TABLEEXISTS('addressdata__t'), FAILJOB('Reference dataset missing or invalid'))"]

```
[
  "IF(!TABLEEXISTS('addressdata__t'), FAILJOB('Reference dataset missing or
invalid'))"
]
```



Lookup examples - data model fields

Use the lookup functions to calculate the value of a field.

Select the field in the object configuration (**Data Model > Data Domains**) and click the **Visibility in Countries** section to add a NEX rule.

Edit Field – Address Validation for Profile UI

FIELD

On this page: [Properties](#) · [Visibility in Countries](#) · [Change Procedure](#) · [Labels](#) · [Source Rankings](#) · [Custom Merge Rules](#) Cancel Save

▼ **Visibility in Countries**

Countries	Network Objects
Countries *	Andorra × Argentina × Armenia × Australia × Austria × Azerbaijan × Bahrain × Belarus × Belgium × Bosnia and Herzegovina × Brazil × Finland × France × Georgia × Germany × Greece × Guatemala × United Kingdom × United States × Uzbekistan ×
Network Objects *	Address ×
Rule Type	NEX Rule ▼
NEX Rule	IF(LOOKUPVALIDATE('addressdatz', Verify
Required / Update	<input type="checkbox"/>

Remove Done

Note: Do not use square brackets ([]) in a NEX rule for a custom field. Errors will occur in data change requests if these characters are used in the rule.

Example 1 - LOOKUP()

Use this NEX function to calculate a reference field value based on specific fields.

This example calculates the `hcp_subtype__c` reference field based on `medical_degree_1__v` and `credentials_1__v`. The `??` coalescing operator functions as ELSE, so if the lookup does not find anything, `D` becomes the value of the `hcp_subtype__c` field.

```
(LOOKUP('hcp_subtype_mapping__t', 'hcp_subtype',  
medical_degree:medical_degree_1__v,credentials:credentials_1__v) ?? 'D')
```



Example 2 - LOOKUPVALIDATE()

Use a NEX rule to calculate a Boolean value (for example, VALID or INVALID and TRUE or FALSE) to a custom field if a combination between fields contained in the lookup table exists or not.

In this example, the function will return a Y or N value for a Boolean reference field if a value is found in the addressdata__t table.

```
IF(LOOKUPVALIDATE('addressdata__t', postal_code__v: postal_code__v,
locality__v: locality__v, administrative_area__v: administrative_area__v,
country__v: country__v), 'Y', 'N')
```

Create a lookup table file

Lookup tables are files that you can create and import into your Network instance. The files must have the following requirements:

- **Format** - Files must be in .csv format
- **Size** - Files cannot exceed 1 GB.
- **Rows** - A maximum of 5 million rows can be included in each file. Note that this limit is not validated when you upload a file; the limit is enforced when a source subscription runs. If the row limit is exceeded, the subscription job will fail.
- **Headers** - Column headers can only contain lowercase letters, numbers or underscores. They must start with a letter. Headers cannot be blank or contain spaces.
- **Delimiters** - Commas are supported

Example file



```
"country__v","administrative_area__v","locality__v","postal_code__v"
"FR","FR-01","Bourg-en-Bresse","01000"
"FR","FR-01","Saint-Denis-lès-Bourg","01000"
"FR","FR-01","Francheleins","01090"
"FR","FR-01","Genouilleux","01090"
"FR","FR-01","Guéreins","01090"
"FR","FR-01","Lurcy","01090"
"FR","FR-01","Montceaux","01090"
"FR","FR-01","Montmerle-sur-Saône","01090"
```

Upload a lookup table

A maximum of 50 tables can be added to your Network instance.

To add a lookup table to your Network instance:

1. In the Admin console, click **Data Model > Lookup Tables**.
2. Click **Create Lookup Table**.

The New Lookup Table page displays.



New Lookup Table Cancel

Import a .csv file that you can use as a lookup to validate your data.


1 Upload File **2 File Preview** **3 Create Table**

Table Name * _1
Lowercase letters, numbers, and underscores only. Must start with a letter.

Description

Third Party Data * Does your file contain third party data? (Example: data licensed from IMS/IQVIA)
 No
 Yes

File Upload


Drag files here (.csv)
or

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

- **Name** - Type a name for this table.

Names must follow these requirements:

- be lowercase letters, numbers, and underscore characters (_) only
- start with a letter
- be a minimum of two characters and cannot contain more than 255 characters.
- must be unique. Duplicate table names are not supported. If a table is deleted, that name can be reused.
- **Description** - Provide a meaningful description. Descriptions can contain a maximum of 255 characters
- **Third Party Data** - Indicate if the file that you are uploading contains third party data. If you choose **Yes**, confirm that you have a TPA in place so Veeva can receive the data.
- **File Upload** - Drag your .csv file into the box or click **Upload File** to choose a file.

When the file is being uploaded, the data is scanned and validated. If there are any issues, fix them and upload your file again.

4. The **File Preview** tab displays a count of the records read from the file (not including the column headers). Four rows of data display by default so you can review the column and row values.



Lookup Tables > New Lookup Table > File Preview

New Lookup Table – address_data__t

Data to be used for address verification.

Cancel Create Table

Preview the file before saving the table.

1 Upload File 2 File Preview 3 Create Table

3738035 RECORDS READ

COLUMN NAME	ROW 1 VALUE	ROW 2 VALUE	ROW 3 VALUE	ROW 4 VALUE
country__v	FR	FR	FR	FR
administrative_area__v	FR-01	FR-01	FR-01	FR-01
locality__v	Bourg-en-Bresse	Saint-Denis-lès-Bourg	Francheleins	Genouilleux
postal_code__v	01000	01000	01090	01090

5. Click **Create Table**.

The lookup table is created and is highlighted on the Lookup Tables page.

If there was an issue, the table will be created but a message will display to advise you that the upload failed. Re-upload the table.

You can now create NEX rules that reference this table. Note that the table name must include the __t suffix when it is used in your NEX rules.

Lookup table options

On the Lookup Tables page, you can search for a specific table name or sort the list to find your lookup table.

Lookup Tables Create Lookup Table

Search lookup tables... Sort by Name Show only created/modified by me Show 10 < 1 of 1 >

address_data__t
Data to be used for address verification.

Created May 12, 2020, 22:11 EDT by Burn, Linda (linda.burn)
Modified May 12, 2020, 22:11 EDT by Burn, Linda (linda.burn)

Download
Re-Upload
🗑️

Download lookup tables

After a table has been created, you can download the table from the list on the Lookup Tables page. Click the **Download** button to save the lookup table to your local computer.



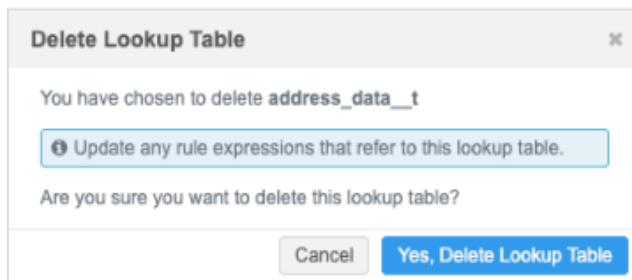
Re-load tables

You can override an existing lookup table by re-loading the file. On the Lookup Tables page, click **Re-Upload** in the table row.

The wizard will open again so you can choose a file. The name and description cannot be changed, but you must confirm the third party data question again. Preview the file and click **Update Table**. Messages will display on the Lookup Tables page to confirm that the table was updated.

Delete lookup tables

If they are no longer used, or created in error, lookup tables can be removed. On the Lookup Tables page, click the **Delete** icon in the table row.



Note: Network rule expressions that reference the table are not deleted during this process; they must be updated.

Lookup table logs

Administrators can view logs for lookup tables in the System Audit History. Any time a user creates, re-uploads, downloads, or deletes a lookup table, the event is logged.

For compliance, whenever a user confirms that third party data is being loaded into Network, it is also tracked in the System Audit History.

Configuration management

Lookup tables cannot be exported to a target environment using the **Configuration Export** feature. The tables must be created in each Network instance.

CLUSTER MANAGEMENT

Customers can 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:

- Greece - IQVIA™

A TPA must be signed with the third party cluster provider to use the cluster management feature.

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



REFERENCE DATA

Spanish (Mexico) has been added as a new reference data language.

This new language will inherit the translations from Spanish with a few exceptions. To review the specific translations, see "Spanish-Mexico" in the **Translation** section of the *Veeva Network 20R1.1 Data Governance* document.

To view reference codes in this language:

1. On the Network menu bar, click **My Profile**.
2. In the **Settings** section, expand the **Language** list and select **Spanish (Mexico)**.
3. **Apply** your changes.

Custom objects

REMOVING CUSTOM OBJECTS AND DATA DOMAINS

Data domains and custom objects can now be removed from your Network instance. For example, if a domain or an object was mistakenly created, or the wrong object was selected as the owner or related object in a relationship object, it can be removed.

Note: After a domain or an object is deleted, the action cannot be reversed.

Supported objects

All custom data model entities can be deleted: data domains, main objects, sub-objects, and relationship objects.

Data domains can be removed if it does not contain objects.

Objects can be removed in the following conditions:

- No record exists in Network for the object. The object was created and enabled, but data has not been loaded.
- There are no tasks created for the object.

The remove option is dimmed if any of these requirements are not met.

Remove a custom object

To remove an object:

1. In the Admin console, click **Data Model > Data Domains**.
2. Open the data domain and select the custom object.
3. At the top of the object configuration page, click the **Delete Object** link.

The page scrolls to the section.



▼ Delete Object

An object can be deleted if it does not contain tasks or records. Once an object is deleted it is no longer accessible in Network. **This action cannot be reverted.**

Delete Object

4. Click **Delete Object**.

The **Impact Summary** displays.

5. Review the associated data model objects that will be removed and the updates to features where the object has been added.

For example, any data validation rules, dynamic access control rules, and profile layouts created for the object will be removed or updated, depending on the object type being removed.

Impact Summary

Deleting this object will also delete or update any associated configurations.

To be deleted

OBJECTS ⓘ
PAYER_HCO_V_REL__C
PAYER_PLAN_V_REL__C
PAYER_V__C

CUSTOM FIELDS ⓘ
PAYER_HCO_V_REL_STATUS__C
PAYER_PLAN_V_REL_STATUS__C
PAYER_V_NAME__C
PAYER_V_STATUS__C
PAYER_V_TYPE__C

CUSTOM REFERENCE TYPES
PAYERTYPE_V__C
PAYERVSTATUS__C

To be updated

DATA DOMAIN
Payer Master

OBJECTS ⓘ
ADDRESS
CUSTOMKEY
HCO
PLAN_V__C

CUSTOM FIELDS ⓘ
ADDRESSES__V

ⓘ NEX rules will not be removed. Review all impacted NEX rules to ensure they still function.



6. In the confirmation dialog, click **Delete Object** to begin the delete process.
7. When the object is deleted, the data domain page displays. The object is removed from the domain.

Remove associated objects

When you delete a custom object, Network will check for and delete any data model entities that were created for the object.

The following data model objects will also be removed:

- System fields created for the object.
- Custom fields created for that object.
- Reference types that are not being used by other fields.
- Dependent sub-objects and relationship objects

If the main object is deleted, the relationship object is also deleted if no owner/related object pair remains.

Example

If a relationship object connects HCPs and Study custom objects and the Study object is deleted, the relationship object will also be deleted. However, if the HCP is the owner object and there are two related objects, Study and Patient, if the Study object is deleted an owner/related object pair (HCP and Patient) still remains. In this case, the relationship object will not be deleted.

Note: Network expressions (NEX rules) will not be removed, but they will not function.

Remove a data domain

A data domain can be deleted if it does not contain objects.

- On the domain configuration page, click **Delete Domain**. In the pop-up, confirm the deletion.

When the domain is deleted, the Data Domains page opens.

If you deleted a domain created with the Payer Master or Product Master template, you can create a domain with that template again.

US compliance data

UPDATE FREQUENCY

US compliance data is now updated weekly by Veeva OpenData. Previously, the data was updated monthly. Compliance data can be viewed on US record profiles in the **Transparency Reporting** preview box.

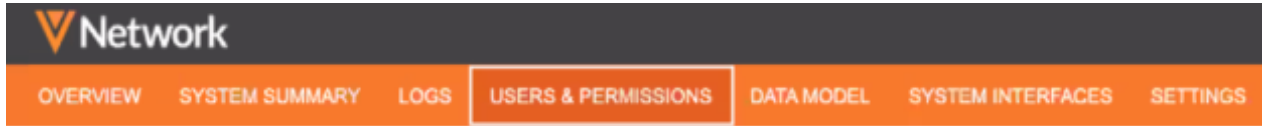
This enhancement is enabled by default if you subscribe to US compliance data.



Users

MENU NAME CHANGE

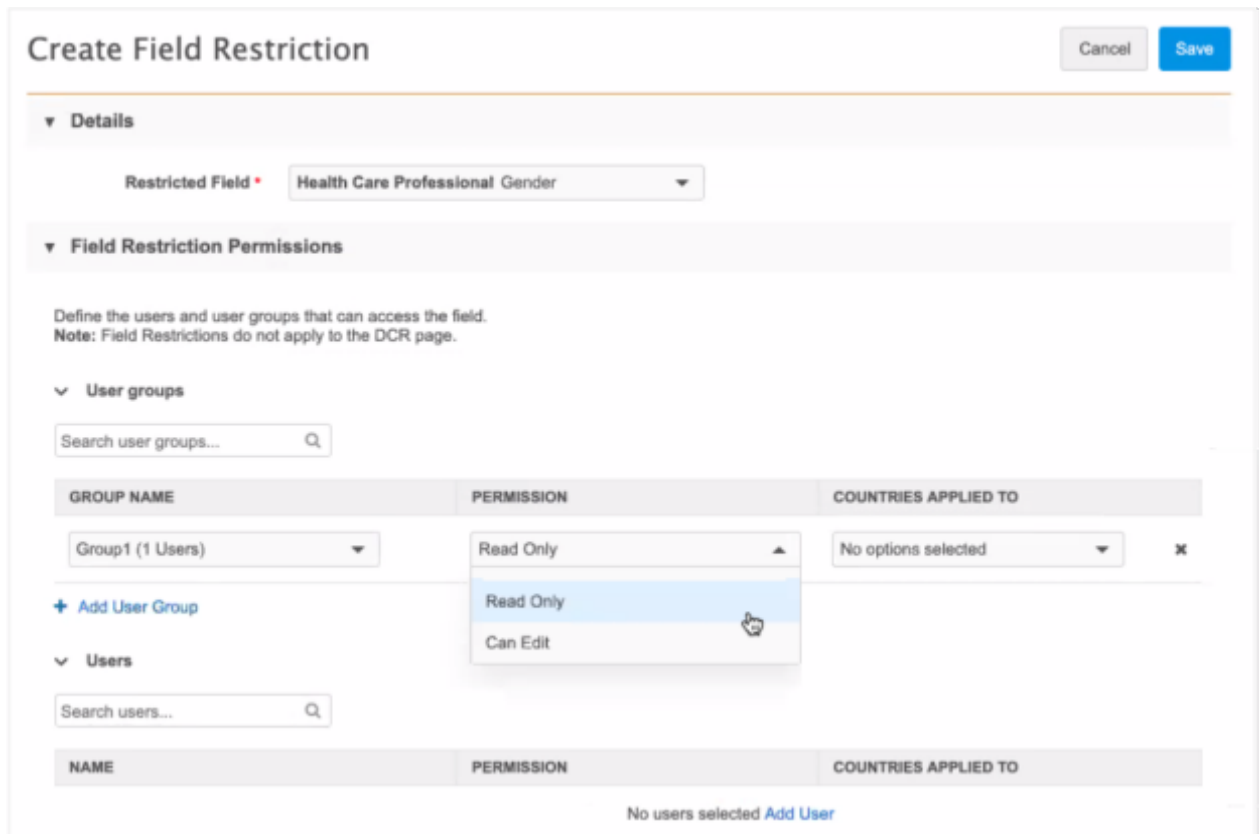
In the Admin console, the **Users** menu has been renamed to **Users & Permissions**. This change more accurately reflects the options that are available in this menu.



FIELD RESTRICTIONS

Administrators can now apply field-level access for specific users or user groups. Previously, field access could only be managed using profile layouts. Now, you can set read-only or edit permissions on specific restricted fields.

This feature is available by default.






Permissions

To grant access to a restricted field, you can assign permissions to specific users and user groups for applicable countries. User groups can be created to efficiently manage field access. Previously, user groups were available to use for restricting access to custom objects through dynamic access control. They can now be used for field restrictions.

The following permissions can be assigned to users and user groups:

- **Read-only** - Users can view the field and value but cannot edit the field. A lock  icon displays when you hover over the field value on the record profile.
- **Edit** - Users can view and edit the field value.

When a restriction is applied to a field, it becomes hidden to all other users in your Network instance and through the API. For example, if you create a restriction on the field `gender__v`, all users have no access to the field in your Network instance and in the API.

Field restriction exceptions

Restricted field access is not applied to the following features:

- Data change requests (DCRs) - Data stewards and data managers can see the field and value on DCRs. If the request is approved, the field will be hidden from them in the rest of the Network UI if they do not have view or edit permission.
- Data load - Restricted fields can be loaded into your Network instance using source subscriptions and data updater. All updates are logged and can be viewed in the Revision History.
- Target export - Restricted fields are available in target subscriptions so you can filter them from the export.

Fields that cannot be restricted

Most standard and custom fields can be restricted. The fields that are not supported are system fields and fields that are used for key Network processes.

Fields that cannot be restricted:

- System fields - Veeva standard fields that are created when a record is created (`created_date__v`, `record_status__v`, `vid__v` and so on).
- Required data model fields
- Custom key fields
- Candidate record field (`candidate_record__v`)
- Disabled fields
- Cluster Management fields



Create a field restriction

1. In the admin console, click **Users & Permissions > Field Restrictions**.
2. Click **Add Field Restriction**.

The Create Field Restriction page displays.

Create Field Restriction Cancel Save

▼ **Details**

Restricted Field *

▼ **Field Restriction Permissions**

Define the users and user groups that can access the field.
Note: Field Restrictions do not apply to the DCR page.

▼ **User groups**

GROUP NAME	PERMISSION	COUNTRIES APPLIED TO
<input type="text" value="US Data Stewards (2 Users)"/>	<input type="text" value="Can Edit"/>	<input type="text" value="1 items selected"/>

[+ Add User Group](#)

▼ **Users**

NAME	PERMISSION	COUNTRIES APPLIED TO
<input type="text" value="admin@verteo.com"/>	<input type="text" value="Read Only"/>	<input type="text" value="251 items selected"/>

[+ Add User](#)

3. In the **Details** section, select the field from the **Restricted Field** list.
Sets of fields display as their grouped name instead of the individual field name. For example, All Emails displays instead of email_1__v, email_2__v and so on.
4. In the **Field Restriction Permissions** section, identify the permissions for user groups and individual users.
 - **Name** - Select the group or user from the list.
 - **Permission** - Choose **Read Only** or **Can Edit**
 - **Countries applied to** - Select the countries for each group and user permission. The list is filtered to include only the countries that the field is enabled for.
5. Save your changes.

The field restriction is now active. Only the users that have Read Only or Edit permission can access the field.



View all field restrictions

All of the field restrictions in your Network instance are listed on the Field Restrictions page. The restrictions are sorted by the **Field Label** column.

Clone field restrictions

Cloning an existing restriction can save time if it applies to the same users and countries.

To clone a restriction

1. On the Field restriction page, click **Clone**.
2. In the **Clone** dialog, choose the new field and click **Next**.

The field restriction is immediately created with the permissions and countries applied for the users.


3. Add or change any user group or user permissions.
4. Click **Save** to update the restriction.

If you click **Cancel**, the field restriction is saved without any changes that you made.

To remove the cloned restriction, click **Remove Restriction**.

Delete field restrictions

When field restrictions are deleted, the field becomes accessible to all users.

- To delete a restriction, click the **Delete**  icon.

User page

To support this new feature, the User page is updated to include a section called **Restricted Field Access**. This section displays all of the restricted fields assigned to the user. Each row displays the field name, entity type, permission, and country that the permission applies to. If the user has different permissions for the same field for different countries, the field displays on separate rows.

The field restriction can be edited from the User page.



data.steward.3.1@network.com Cancel Save

FTP Access: Don't Allow

Reports: Display Tab

SQL Query Editor: Don't Allow

Data Quality Report Access: Read-only access

▼ Restricted Field Access

FIELD NAME	FIELD LABEL	ENTITY TYPE	PERMISSION	COUNTRIES	
gender__v	Gender	Health Care Professional	Read only	United Kingdom	Edit
gender__v	Gender	Health Care Professional	Can edit	United States	Edit

User Groups

Previously, user groups were available to assign permissions to specific custom objects using the Dynamic Access Control feature. User groups can now be used for field restrictions so you can quickly assign and update permissions to groups instead of individuals.

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

US Data Stewards Cancel Save

▼ Details

Name: US Data Stewards

Description: User group for data stewards in the US

Status: Active Inactive

▼ Users

Search selected users ... Add Users

NAME	USERNAME	TYPE	SECURITY POLICY	PROFILE	INBOX TASK GROUPS	STATUS
Monroe, Rose	rose.monroe@verteocom	Data Steward	Classic	US Data	Data Stewards	Active
Woods, Scott	scott.woods@verteo.com	Data Steward	Classic	US Data	Data Stewards	Active

Displaying 1 to 2 of 2 Show 10 1 of 1



Data model

In the data model, administrators and data managers can use a new column, **Field Access**, to quickly see what fields are available to all users or are restricted.

NAME	LABEL	FIELD ACCESS	TYPE	REFERENCE TYPE	STATUS
academic_title__v	Academic Title	All Users	Reference Type	HCPAcademicTitle	Enabled
sha_id__v	SHA ID	All Users	Text		Enabled
specialty_10__v	Specialty 10	Restricted	Reference Type	Specialty	Enabled
specialty_10_rank__v	Specialty Rank 10	All Users	Integer number		Enabled
specialty_1__v	Specialty 1	Restricted	Reference Type	Specialty	Enabled

- Click the **Restricted** link to navigate to the field restriction for more information or to make changes (administrators only).
- Click the field name to open the configuration page. The **Properties** section shows that the field is restricted. Administrators can click the **Manage Field Restriction** link to navigate to the Field Restrictions page for more information.

Edit Field – Specialty 3

FIELD

On this page: [Properties](#) · [Visibility in Countries](#) · [Change Procedure](#) · [Labels](#) · [Source Rankings](#) · [Custom Merge Rules](#)

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

Properties

Name [specialty_3__v](#)

Effective Version [1.0.0](#)

Type [Reference](#)

Reference Type [Specialty](#)

Enabled?

Description [Tertiary specialty](#)

Restricted [Field is Restricted.](#) [Manage Field Restriction](#)



Required fields

If a field is set as **Required/Update**, field restrictions cannot be applied to it because all users must be able to view it. Similarly, if field restrictions have been set on a field, the **Required/Update** option is dimmed and cannot be selected.

To see if a field is required, open the field's configuration page from the data domain. In the **Visibility in Countries** section, select a country group and view the **Required/Update** option.

Edit Field – First Name ▾

FIELD

On this page: [Properties](#) · [Search Behaviour](#) · [Visibility in Countries](#) · [Change Procedure](#) · [Labels](#) · [Source Rankings](#)

Cancel Save

▾ Visibility in Countries

Countries	Network Objects
Managed by a Master Data Source	
Countries *	Canada Germany Ireland Italy Spain United Kingdom United States
Network Objects *	Health Care Professional
Rule Type	Default Value ▾
Value	
Required / Update ⓘ	<input checked="" type="checkbox"/>

⚠ Done

Report considerations

If you run a report, the results will return the field column but the value will be empty.

Network API

Restricted fields are hidden from Integration users in the response for the following API calls:

- Search
- Retrieve Entities
- Retrieve Change Request
- Batch Retrieve Change Request



Logs

Administrators can track new restrictions and changes to existing restrictions in the System Audit Log. In the **Object Type** field, select `FieldAccess` to view all of the field restriction actions in your Network instance.

System Audit History Export

Date range: To: Object Types: Properties: Get History Reset

Last 7 days ▾

EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE
936651676825554079	2020-06-01 19:33:30 IST	admin@verteo...	[specialty_9__v]:[HCP]	Create	FieldAccess	[User Id][51]:Permission	READONLY
936651676825554079	2020-06-01 19:33:30 IST	admin@verteo...	[specialty_9__v]:[HCP]	Create	FieldAccess	[User Id][51]:Countries	[PR, PS, PT, AA...
936651676825554079	2020-06-01 19:33:30 IST	admin@verteo...	[specialty_9__v]:[HCP]	Create	FieldAccess	[User Id][51]:User Id	51
936651676825554079	2020-06-01 19:33:30 IST	admin@verteo...	[specialty_9__v]:[HCP]	Create	FieldAccess	[User Id][51]:Object Name	HCP
936651676825554079	2020-06-01 19:33:30 IST	admin@verteo...	[specialty_9__v]:[HCP]	Create	FieldAccess	[User Id][51]:Attribute Name	specialty_9__v
936651676791344287	2020-06-01 19:33:29 IST	admin@verteo...	[specialty_8__v]:[HCP]	Create	FieldAccess	[User Id][51]:Permission	READONLY
936651676791344287	2020-06-01 19:33:29 IST	admin@verteo...	[specialty_8__v]:[HCP]	Create	FieldAccess	[User Id][51]:Countries	[PR, PS, PT, AA...

Configuration management

Field restrictions cannot be exported to a target environment because the users on the target might be different.

API ACCESS PERMISSIONS

Administrations can now define the specific systems that users with API permissions can access. Previously, users were either allowed all access or no access to the Network API. Linking the user to the system prevents users from performing API calls under an incorrect Network system. For example, if you have an Integration user for a portal, you can give the user access to only the portal system to ensure they don't accidentally make API calls for another system.

▾ **Additional Permissions**

API Access ▾

Select the systems this user will have API access to

▾

This enhancement is available by default in your Network instance.



Define API access

To define API access for a user, go to the **Additional Permissions** section on the user profile.

The **API Access** list now contains three options:

- **Don't Allow** - Users do not have access to the Network API
- **Allow All Systems** - Users have access to perform API calls from all systems.
- **Selected Systems Only** - Users have access to perform API calls from the defined systems.

If you choose this option, identify the systems using the list.

When the permission is applied, if users try to make API calls from a system that they do not have access to, an error occurs.

Updates to API calls

To support this feature, API calls that are used to change data will enforce systems permissions.

The following API calls are affected:

Change Request	Associate Custom Key	Create and Cancel Subscription Jobs
Create Change Request	Associate Custom Keys	Create Source Subscription Job
Update Change Request	Batch Associate Custom Keys	Cancel Source Subscription Job
Create Change Request	Associate Custom Keys to Children	Create Target Subscription Job
	Batch Associate Custom Keys to Children	Cancel Target Subscription Job
	HCP Associate Key (4)	
	HCO Associate Key (4)	

Network integrations

NETWORK BRIDGE CREDENTIALS

The Network Bridge can now run using Salesforce™ credentials that are stored in Veeva CRM. Previously, Salesforce credentials had to be maintained in both Network and CRM. Now, using the CRM organization ID, Network can access the Salesforce session ID so administrators only have to update the credentials in CRM.

This enhancement is available in your Network instance by default.



Create the CRM Org credential

Before you create the CRM credential, ensure that valid Network and Salesforce credentials are stored on the Network Administration page in Veeva CRM.

For more information, see the [Administrative Tools](#) topic in the *Veeva CRM Online Help*.

To add the CRM credential:

1. In the admin console, click **Settings > External Credentials**.
2. Click **Add Credentials**.
3. In the dialog, select **Veeva CRM - Org ID**. Click **OK**.
4. On the **New External Credential** page define the following information:
 - **Name** - Type a meaningful name.
 - **Organization ID** - Type the 18-digit CRM Organization ID.

New External Credential Cancel Save

Type Veeva CRM - Org ID

Name

Organization ID (18-digit)

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

To test the credentials, an API call to Veeva CRM checks for valid Network credentials, valid Salesforce credentials, and that the Network user exists in the instance.

You can run the Network Bridge using your Salesforce credential or this CRM org credential.



NETWORK ACCOUNT SEARCH

Veeva CRM users use Network Account Search to search for accounts in Network. Enhancements have been to the Network Account Search, particularly for addresses, to help you get more relevant results.

These enhancements are enabled by default.

Search tips

- Narrow your search results by providing a name and address.
- General search box - Searching with a name and/or identifiers (NPI, SLN, VID) will return more relevant results. For example, search for a specific NPI, License, or Network entity ID (VID).
- Address search box - Use this to search for fields on addresses. For users in the United States, provide the city and the state abbreviation; for example, Boston, MA.

For more information about [Network Account Search](#), see the *Veeva CRM Online Help*.

NETWORK BRIDGE ERRORS

Updates have been made to the Network bridge to help you to easily troubleshoot job errors. The Job Details page is redesigned to highlight any record-level errors that occurred during the job and includes an error log that can be downloaded. Record-level errors are also restructured into more granular categories to provide more information for administrations. Previously, many of the record-level issues were considered "Salesforce Upsert Errors".

These enhancements are enabled by default in your Network instance.

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

Job details

This page now includes a **Job Results** section that highlights the Veeva CRM records that have been added and updated and any errors that occurred during the job. If errors occurred, a count for each record-level category displays in the Error Type table. Click **Download Error Report Log** review the errors in more detail.



Job Details (ID: 39288)

Job Results

+ 526
CRM RECORDS ADDED

⚠ 59737
RECORD LEVEL ERRORS

[Download Error Report Log](#)

ERROR TYPE	AMOUNT
Locking Error	2000
Mapping Error	200
Salesforce Upsert Error	5100
System Limit Exception: Apex Limit Error	3519
System Limit Exception: Too Many Query Rows Error	345
Trigger Flow Error	25173
Unexpected error while processing BULK-API	23400

Overview

Subscription network_bridge_crm_pm_us

Job ID 39288

Percent Complete 100%

Outcome ✔ Completed

Start Time 2019-07-15 18:39:00 IST

Duration a few seconds

Failed jobs

If a job fails, the **Job Results** section displays the reason for the failure.

Job Details (ID: 39288)

Job Results

✘ Unexpected error has occurred. Please contact Network Support.

Overview

Subscription network_bridge_crm_pm_us

Job ID 39288

Outcome ✘ Failed

Start Time 2019-07-15 18:39:00 IST



New error categories

The Salesforce Upsert Errors have been categorized into more granular record-level error categories.

Error Category	Error Message	Reason for Error
Locking Error	UNABLE_TO_LOCK_ROW or TooManyLockFailure	Two or more processes are trying to update a record. This is usually caused by CRM custom triggers that update other records.
System Limit Exception: Apex Limit Error	System.LimitException: Apex	Customizations in CRM exceed the Apex Governor Limits.
System Limit Exception: Too Many Query Rows	System.LimitException: Too many query rows	Customizations in CRM are trying to perform too many queries.
Trigger Flow Error	CANNOT_EXECUTE_FLOW_TRIGGER	A custom CRM workflow is causing issues with processing records from the bridge.
Unexpected error while processing BULK-API	Got an unexpected error while processing BULK-API	This is a Salesforce™ gack response. A gack occurs when an error is thrown and Salesforce didn't catch or handle it.

EXTERNAL CREDENTIALS

Credentials that are saved for external applications must follow specific URLs patterns for security reasons. Some of the credential types have been updated to comply with the security guidelines.

This enhancement is enabled by default in your Network instance.

Concur

The following URLs can be selected for Concur credentials:

- <https://www.concursolutions.com>
- <https://implementation.concursolutions.com>
- <https://eu1.concursolutions.com>
- <https://www.concurcdc.cn>

The **Custom** URL option has been removed.

Nitro API

For Nitro API credentials, the URL must match the following pattern:

```
https://*.veevanitro.com
```



Nitro FTP

The Nitro FTP URL must match the following pattern:

```
*.veevanitro.com
```

Vault

The URL in Vault credentials must match the following pattern:

```
https://*.veevavault.com
```

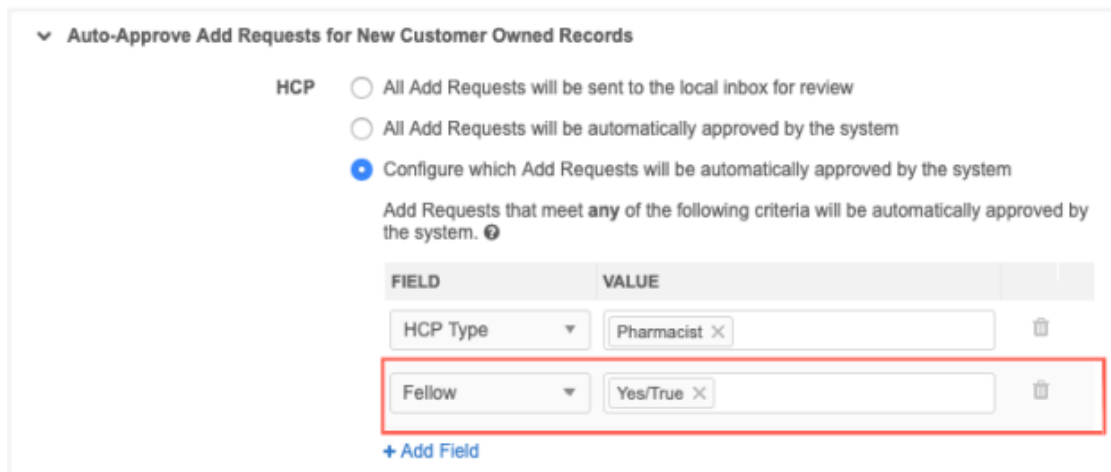
Admin settings

WORKFLOW SETTINGS

In version 20R1.0, workflow settings were updated to include any reference type fields. Now, Boolean reference fields are now supported for the workflow settings. You can use these BooleanReference and Checkbox type fields to be more specific about the records that are auto-approved or records that are returned to local data stewards if rejected by Veeva OpenData.

Example

In this example, add requests for locally managed records will be automatically approved if the HCPs are pharmacists OR they are Fellows.



This enhancement is available in your Network instance by default.



Updated workflow settings

The following workflow settings have been updated to include Boolean fields:

- **Auto-Approve Add Requests for New Customer Owned Records**
- **Auto-Approve Change Requests for Customer Owned Records**
- **Review OpenData Rejection of Add Requests**

Security

SINGLE SIGN-ON

SAML for Single Sign-on now includes a relay state URL. `RelayState` is a parameter that defines where identity providers (idPs) send users after they authenticate. By default, a relay state URL is automatically generated for existing customers, but a custom URL can be defined. In some cases, there are idPs that use a different relay state parameter or URL. This setting gives administrators more flexibility to use different identity providers.

This enhancement will be enabled by default in all Network instances in the Production release, version 20R1.1.1. It supports the Network widgets and the SSO button on the Network login page.

▼ SAML for Single Sign-On

Enable SAML for Single Sign-On

SAML Version * 2.0

SAML User ID Type * Federation ID

Issuer * http://www.okta.com/exkma06poxdc8UycN0h7

Identity Provider Certificate *

Identity Provider Login URL * https://dev-832101.oktapreview.com/app/veevanetworkde

Identity Provider Relay State URL Automatically Generated URL Custom URL with Relay State

https://ldmtest.incresearch.com/oamfed/ldp/initiatesso?pr

Custom URL must include "{NetworkToken}"

Example: https://verteo.idp.com/.../sso/saml?relayState={NetworkToken}

Network SSO Login URL https://widgetdemo.vdmdev.com/auth/saml/consumer/_53



Define a custom URL

Some identity providers do not use `relayState` as a parameter for capturing relay state and expect the `returnURL` parameter instead. To support these identity providers, you can define a custom URL. Custom relay state URLs must contain `{NetworkToken}`.

Example custom URL

```
https://verteo.myidp.com/app/veevanetwork832101_mynetwork_1/exkfi8zpxwlK9gIK70h7/sso/saml?returnurl={NetworkToken}
```

Network uses the custom URL during authentication and replaces `{NetworkToken}` with a specific URL or token to direct the user to the correct place.

API

VERSION UPDATE

The Network API is updated to v21.0.

As with all version updates, integration users should continue to use v20.0 until there is a change for v21.0 that they want to apply.

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

BULK EXPORT API

Integration users can now use the Network API to retrieve data in bulk using API calls. Full exports can be large, so to prevent timeouts, the `.csv` file can be divided using the new `split` option for the existing `export_archive` parameter. The files will be split so no file is larger than 1GB.

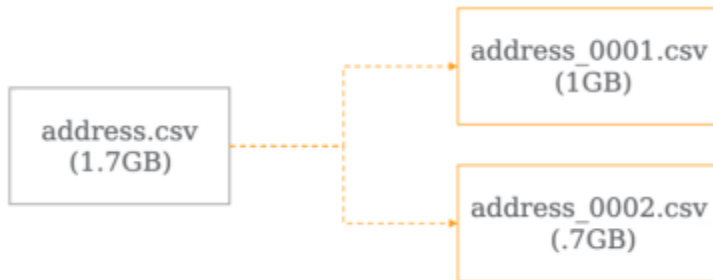
All `.csv` files generated by the target subscription will be split, including Source Data files if you selected that option in the subscription settings.

The files are appended with a number (`_0000`, `_0001`, and so on) and are added to your outbound FTP folder. This is not configurable through the Network user interface.



Example

The address.csv is more than 1GB, so the files will be exported uncompressed and split into two files.



This feature is enabled by default.

Split files

Use the following parameters and options to split files in your target subscription to prevent timeouts. The file size maximum is 1GB.

Parameter

Name	Required?	Description
export_archive	No	Specifies how the files will be placed in your outbound FTP folder.

New option

- split - Divides the uncompressed .csv files so no file exceeds 1GB.

Example

```
POST
{{URL}}/api/v21.0/systems/demo/target_subscriptions/export/job?export_archive=split
```

Accessing the files

API

If you have split the files, you can view the links to the .csv files in jobExportLinks so they can be accessed directly from the API.

Sample call

```
GET {{URL}}/api/v21.0/systems/demo/target_subscriptions/export/job/228
```



Sample response

```
{
  "responseStatus": "SUCCESS",
  "job_id": 228,
  "job_status": "COMPLETE",
  ...
  "export_archive": split,
  "jobExportLinks": [
    {
      "object": "<objectname>",
      "href": "/artifact/job/<jobid>/<filename>",
      "method": "GET",
      "accept": "text/csv"
    },
    {
      "object": "hcp",
      "href": "/artifact/job/228/hcp_0001.csv",
      "method": "GET",
      "accept": "text/csv"
    },
    {
      "object": "hcp",
      "href": "/artifact/job/228/hcp_0002.csv",
      "method": "GET",
      "accept": "text/csv"
    }
  ]
}
```

Target subscription

You can also access the .csv files from a target subscription using the API.

Sample call

GET

https://verteo.veevanetwork.com/api/v21.0/artifact/job/228/hcp_0001.csv

Sample response

```
"vid_v","first_name_v","middle_name_v","last_name_v","hcp_status_v","specialty_1_v","medical_degree_1_v","record_state_v"
"242993418349839362","Zachary","R","Thomas","A","AN","MD","VALID"
"243082079594611713","Dean","T","Lopez","A","PHT","PT","VALID"
"243090311377585154","Lori Lynn","Baylor","I","US","RN","VALID"
"243100754808669185","Gerri","Thomas","Engrid","A","AN","NP","VALID"
"243133377207600136","Sandra","Susan","Leaf","A","GP","RN","VALID"
"243143545802720257","Iara","Del Mar","Iglesias","A","OBG","MD","VALID"
"243154001430840328","Alai","Alvarado","A","EM","MD","VALID"
"243161953747338249","Marcus","Karlan","Park","A","PMM","MD","VALID"
"243163308230706170","Alfred","Oh","May","A","AI","MD","VALID"
```