Veeva Network

Veeva Network 20R2.1.1 Release Notes

October 2020

Contents

About these Release Notes

These Release Notes describe all features that are included in Veeva Network 20R2.1.

SUBSCRIBE TO RELEASE NOTIFICATIONS

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

- **Software releases and maintenance** - Go to trust.veeva.com. At the top of the page, click **Subscribe to Veeva Trust Site** and subscribe to the Veeva Network component.
- **Release Notes and Data Governance documents** - PDF files are posted on the Veeva Support website. To be notified when new documents are published, click the **Follow** button on that page or the Announcements section in the Network Community.

For more information, see About Network 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

Updates since the Sandbox version was published

The following enhancement has been added:

- **Sandbox instance URL** - Beginning in version 20R3.0, Sandbox instances will have unique URLs.

Updates since the Early version was published

The following enhancement has been added:

- **Increment delta ID for Veeva CRM** - Delta IDs for rejected DCRs are incremented to ensure data is synced between Network and CRM.

The following enhancements have been removed:

- **Source system type** - A system type and icon can now be added to source systems.
- **Source subscriptions error log** - The Job Error Log now includes a Native Key column.

These enhancements will be available in a later release.

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 20R2.1 minor release.

		ST	DS	DM	AD
General updates					
Browser support	Network support for Internet Explorer™ 11 is ending in version 20R3.0.	●	●	●	●
Sandbox URL	Beginning in version 20R3.0, your Sandbox instance will have its own URL.				●
Data updater					
Address cleansing	Data updater jobs for address objects now contains an option to enable or disable address cleansing.			●	●
Data domains					
ERD view	Network now provides an entity relationship diagram (ERD) view for each data domain in your Network instance.			●	●
Veeva OpenData subscriptions					
Convert opted-out records	When HCPs opt-out of OpenData, the records can now be automatically converted to customer-managed records.			●	●
Filter labels	Some field labels for filters are updated to more accurately reflect how the filters work.			●	●
Source subscriptions					
Record state property	A new advanced property can be defined to determine which records should be updated during a job.			●	●
Target subscriptions					
Exported files	Target subscriptions now contain options to define fixed FTP folder names and exported file formats.			●	●

		ST	DS	DM	AD
Admin settings					
Workflow settings for sub-objects	Administrators can define rules to route custom sub-object types to local data stewards.				●
Users					
New user type	A new user type called System and Data Admin combines the capabilities of system administrators and data stewards.				●
Welcome email	The new user welcome email is updated to include the user type and Network instance URL details.	●	●	●	●
Network Integrations					
Migration to Network Bridge	Network instances that use the CRM Data Subscription will be automatically migrated to the Network Bridge.			●	●
Veeva CRM - Delta IDs	Delta IDs for rejected DCRs are incremented to ensure data is synced between Network and CRM.			●	●
Veeva Connector - Nitro	The target subscription for the Nitro Connector now exports individual .gz files to your FTP server.				●
API					
Search exclusion filters	Integration users can now exclude records from search results using custom fields without excluding Veeva OpenData results.		Developer		

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

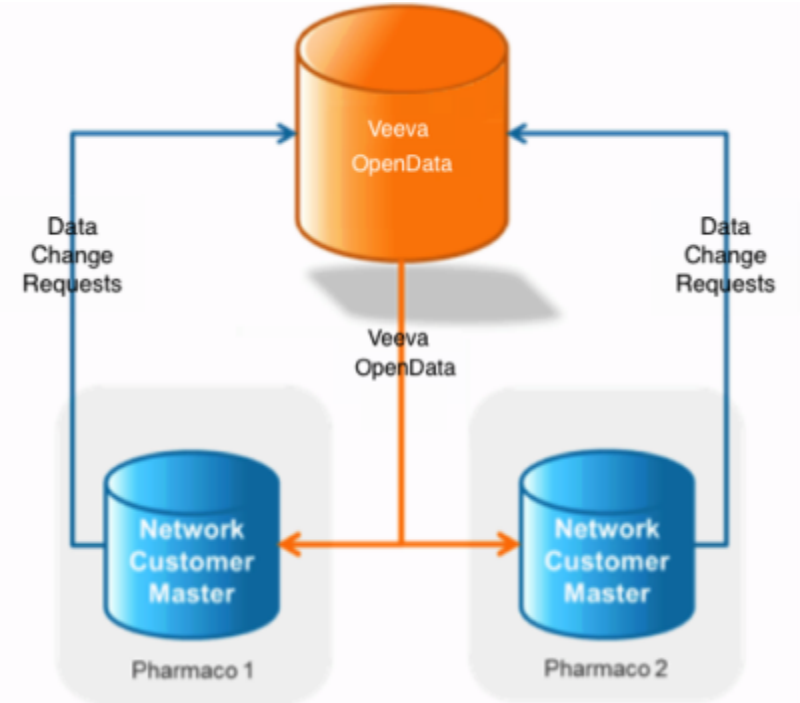
Data Governance - Specific updates for fields and reference data are provided in the *Veeva Network Data Governance* release notes for every minor and major Network release.

Introduction

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

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

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



Network Customer Master

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

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

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

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

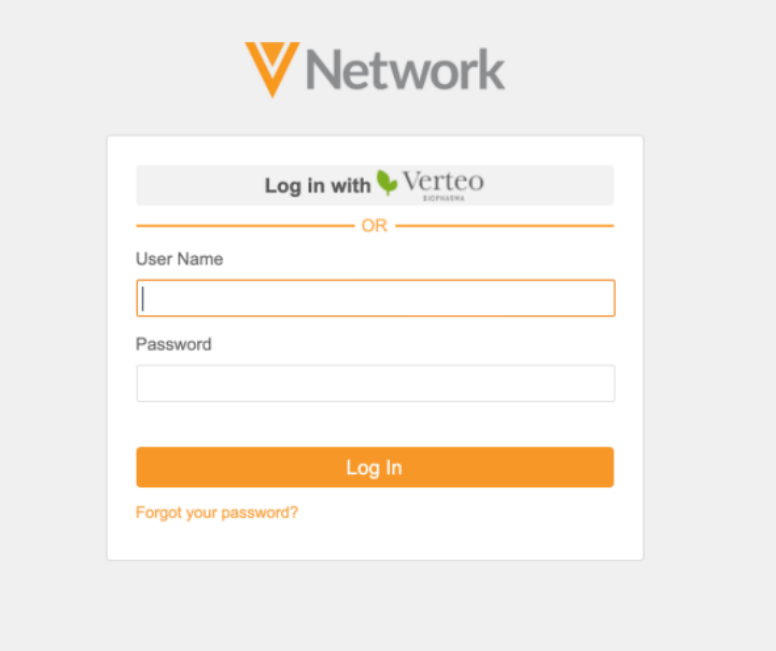
General updates

BROWSER SUPPORT

Support for Internet Explorer™ 11 will end in Network version 20R3.0.

SANDBOX INSTANCE URLS

Beginning in version 20R3.0, your Sandbox instance will have its own URL. Currently, Sandbox instances have a generic URL; for example, `sandbox.veevanetwork.com`. Providing a unique URL allows you to display the single sign-on button on your Sandbox instance's login page. There is no impact on existing API or FTP integrations. The previous URL for your Sandbox instance will still be valid.



Example

A Network customer, Verteo, has one Production instance and two Sandbox instances. After version 20R3.0, the Sandbox instances will have unique URLs.

Instance	Login URL - Before 20R3.0	Login URL - After 20R3.0
Verteo (Production)	`verteo.veevanetwork.com`	`verteo.veevanetwork.com`
VerteoDev (Sandbox)	`sandbox.veevanetwork.com`	`verteodev.veevanetwork.com` or `sandbox.veevanetwork.com`
VerteoQA (Sandbox)	`sandbox.veevanetwork.com`	`verteoqa.veevanetwork.com` or `sandbox.veevanetwork.com`

This enhancement will be enabled by default in version 20R3.0. If you have any questions, contact Veeva Support.

Data updater

ADDRESS CLEANSING

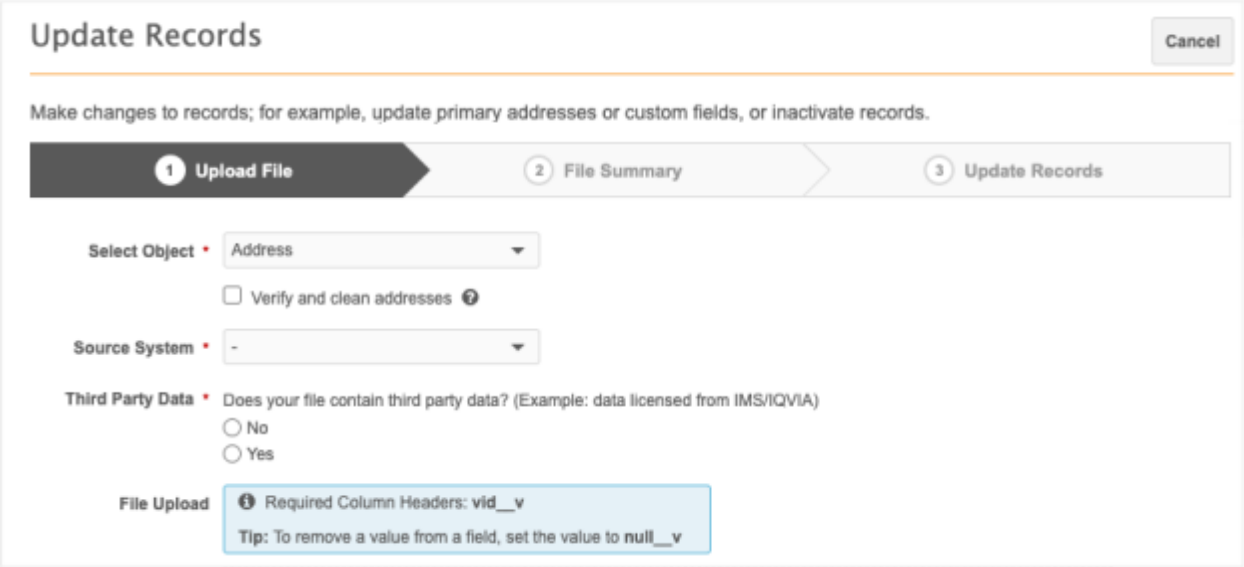
Administrators and data managers can now choose to enable address cleansing when they run a data updater job to update addresses. Address cleansing verifies addresses and parses the data into Network fields. Because cleansing can change the address data in your uploaded file, you might not want cleansing to occur; for example, if you are correcting postal codes on existing addresses. However, it is helpful to use Network's address cleansing to correct entire addresses. Now, you have the option to enable address cleansing depending on the address data in your file.

This enhancement is available by default in your Network instance.

Address cleansing options

Disable cleansing

When you create a data updater job, the option for address cleansing displays after you choose the address object. The option is disabled by default.



When address cleansing is disabled, only the `vid__v` column is required in the file that you upload. When the job runs, the updates in your file are applied to existing address records.

Enable cleansing

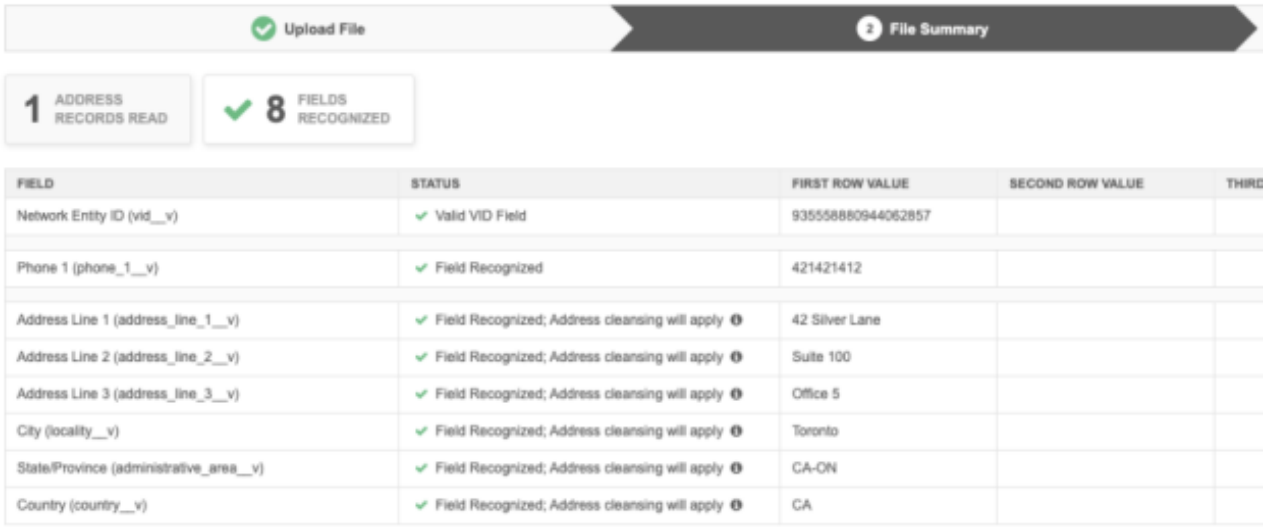
If you enable the **Verify and clean addresses** option, address cleansing occurs during the job. Network's third party cleansing service verifies and parses addresses into Network's address fields. This is helpful if you are using the data updater job to correct entire addresses.

When address cleansing is enabled, several column headers (fields) are required in your file:

- `vid__v`
- `address_line_1__v`
- `locality__v`
- `administrative_area__v`
- `country__v`
- `postal_code__v`

Click **See Example** to view an example file with the required fields. These fields ensure that address cleansing can occur. If the fields are not in your file as column headers, the upload will fail.

On the **File Summary** tab, the **Status** column confirms that address cleansing will apply to the field.

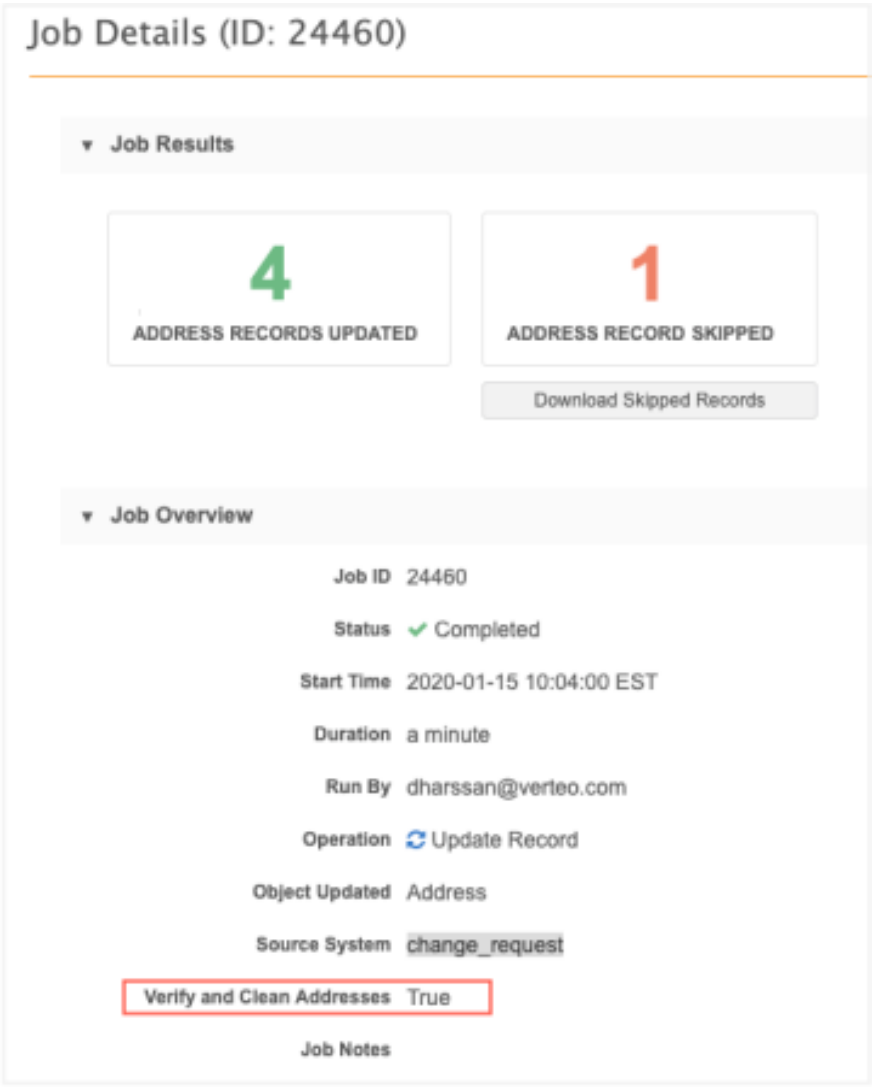


If address cleansing is not enabled for a country, but the **Verify and Clean Addresses** option is set, the data updater job simply skips the address verification and cleansing for any records for that country.

Network remembers your choice for the next time you log in and create a data updater job for addresses.

Job Details

The **Verify and Clean Addresses** heading on the Job Details page indicates whether address cleansing occurred for jobs for address objects. The heading does not display for jobs for other objects.



Data domains

ERD VIEW

An entity relationship diagram (ERD) view is now available for each data domain in your Network instance. Use this view to get a better and faster understanding of your data model. This is also helpful to use for reporting to understand what tables you can join in your SQL query. The view is read-only, but if you update your data domain the view immediately refreshes so you can see the changes.

This feature is available by default in your Network instance.

The ERD view loads when you open a data domain page. Click the view to see the full diagram.

Objects

All enabled and disabled objects assigned to the data domain display in the ERD view. Custom keys do not display. Object types are identified by the colors in the legend. Veeva-owned objects are indicated by a Veeva icon next to the object name.

When a relationship object contains a main object that is not in the current domain, the object still displays in the ERD so you have a complete view of the relationship. A dotted line on the object indicates that the main object is in another domain.

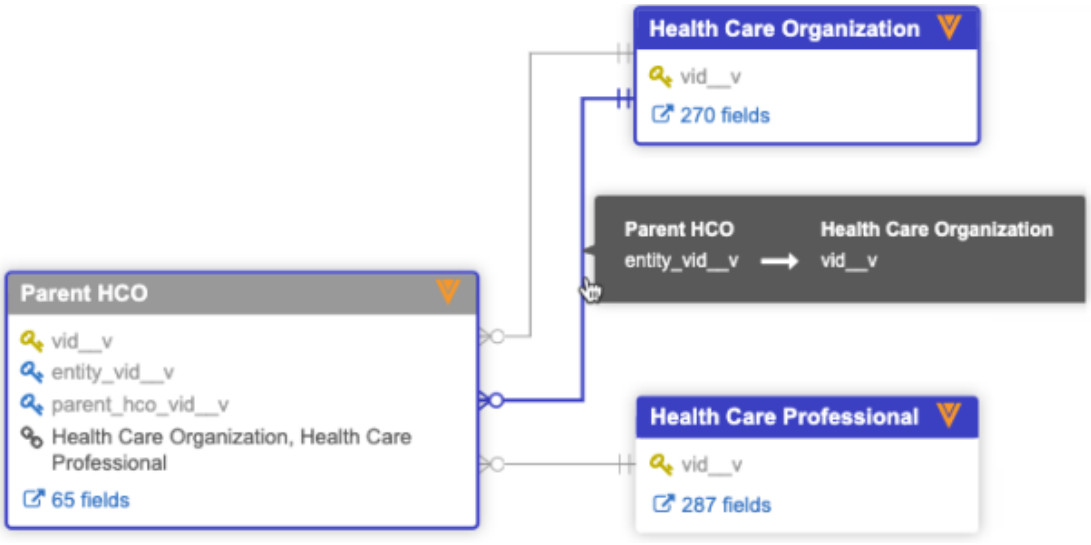
Each object identifies the following items:

- **Primary key** - The field that uniquely identifies an object and that is used to associate a main object to sub-objects and relationship objects.
- **Foreign Key** - The primary key field from a main object that is used to reference a main object on a sub-object or relationship object. Relationship objects contain two foreign keys; one for the owner object and one for the related object in the relationship.

  Hover your cursor over the line that connects two objects to view a tooltip that shows the related objects as well as the primary and foreign keys used to connect the objects.

  Example

  In this example, there are two lines connecting the Parent HCO and HCO objects because the HCO object is both an owning and related object in the relationship. The Parent HCO's foreign key, `entity_vid__v`, is used to associate it to the HCO's primary key, `vid__v`.

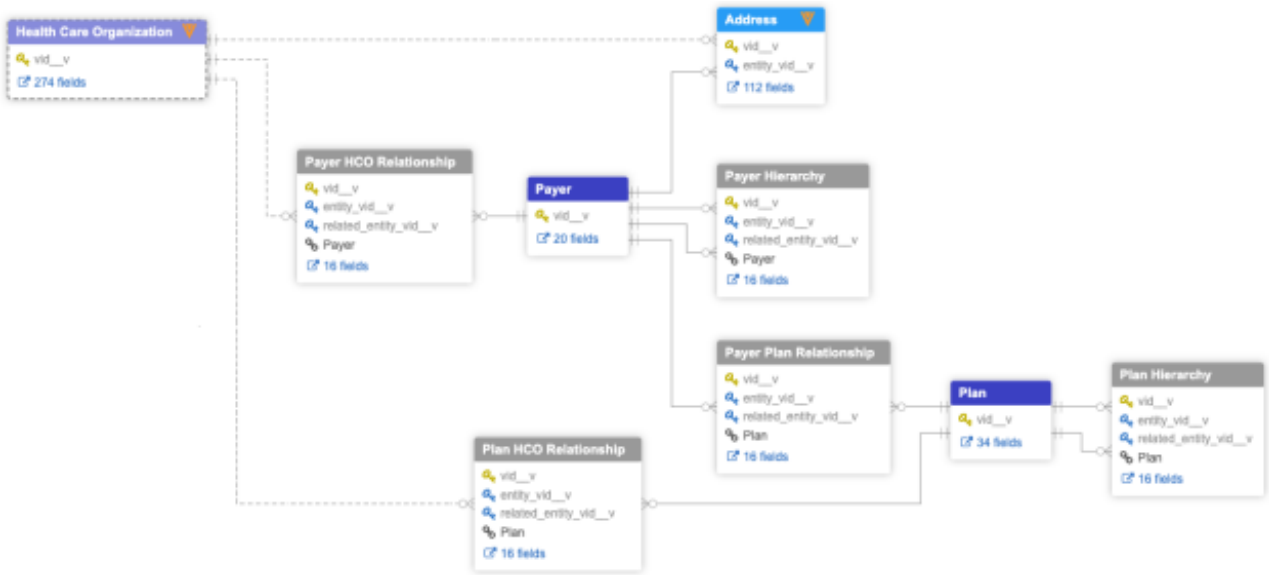


- **Relationship owner** - Relationship objects only. The main object that is the owner of the relationship.
- **Fields** - A count of the fields for the object. Click the link to navigate to the object's configuration page to view the fields in more detail.

Clear the **Show Fields** option to see a more simplified view of the ERD diagram.

Custom data domain example

The Payer Master domain contains Veeva standard objects and custom objects.



Veeva OpenData subscriptions

CONVERTING OPENDATA OPT-OUTS

Administrators now have the option to configure an OpenData subscription so opted out records for Veeva OpenData HCPs are automatically converted into customer-managed records.

Today, when HCPs opt out of OpenData, the record is no longer actionable; it disappears from your Network instance and is masked in Veeva CRM. However, some HCPs that opt-out of OpenData still consent to customers continuing to store and process their data. In this case, Network can convert the OpenData record into a customer-managed (local) record that keeps the same Network entity ID. This enables you to retain the history of transactions and to continue engaging with the HCP.

OpenData country subscriptions contain the setting to convert opted-out HCP records into customer-managed records. The setting is managed by country so you have the flexibility to convert records in some countries but not others. For example, your compliance team might have a policy for some countries that opted-out records in Opendata must be opted out in your Network instance also.

When records are converted, the following information is retained on the customer-managed record:

- All IDs on the record (Veeva ID, alternate IDs, custom keys).
- The account record in Veeva CRM including all of its transactional data.

This enhancement is available in all OpenData country subscriptions in your Network instance. The setting is disabled by default.

Note: This feature applies only to future records that are opted-out of OpenData; it does not apply to records that have been opted-out in the past.

Some countries do not use the data privacy opt-out feature. If the setting is enabled for the country, there is no impact to your data.

Supported records

OpenData records can be converted into local records if the record existed in your Network instance before it was opted-out. If the HCP record was not downloaded before the record was opted-out, it cannot be converted to a local record.

Convert records

In Europe, when HCPs request to be opted out, OpenData sends an email every 15 days to inform customers about the requests. Ten days later, the `data_privacy_opt_out__v` field is set to `True` for those HCP records. If you enabled the option to convert opted-out records in your OpenData country subscription, the next time you sync with OpenData, the record will become a local record.

To enable the option:

1. In the admin console, click **System Interfaces > OpenData Subscriptions**.
2. Open a country subscription and select **Convert OpenData opt-outs into customer-managed records**.

After the record is converted, it will no longer be updated by OpenData. It cannot be downloaded from OpenData again and the Send to OpenData button on the profile is hidden from local data stewards so the record cannot be taken over by OpenData.

If the opted-out record is not converted into a customer-managed record, it is no longer available in your Network instance. This is the existing data privacy opt-out behavior.

Updates to converted records

When Veeva OpenData records are converted to local records, the following changes are applied:

Changes to fields

Fields are updated to identify the change in ownership.

Field	Old Value	New Value
record_owner_type__v	OpenData	Locally Managed
record_owner_name__v	OpenData	Local
is_veeva_master__v	True	False
data_privacy_opt_out__v	No/False	No/False

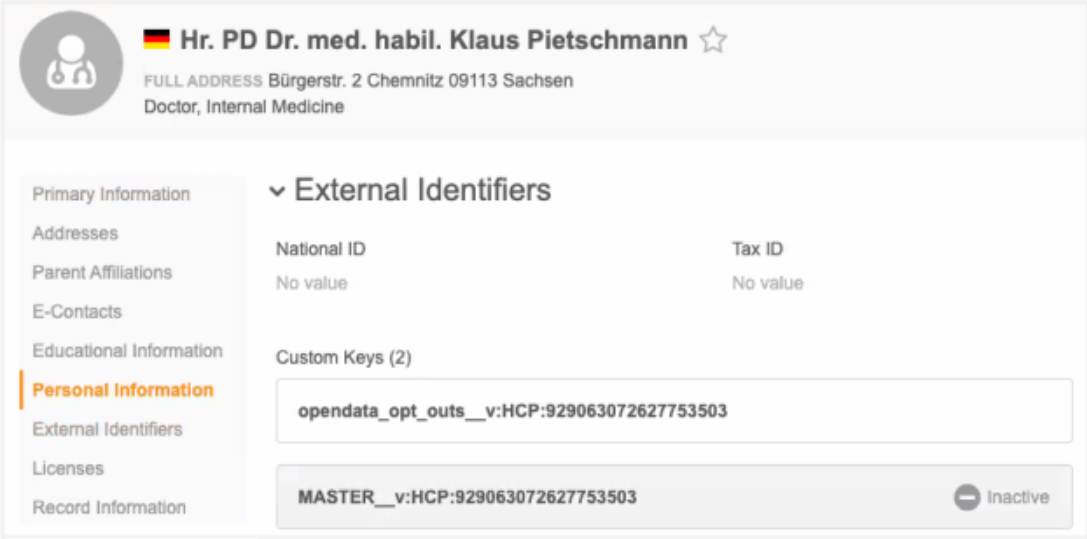
All locally managed fields and sub-objects are retained when the OpenData record is converted to a locally managed record.

New source system

A new Veeva-owned system called `opendata_opt_outs__v` is added to your Network instance. Any opted-out OpenData record that is converted will be assigned to this system. This enables you to easily track the records that have been converted. The system cannot be used in source and target subscriptions.

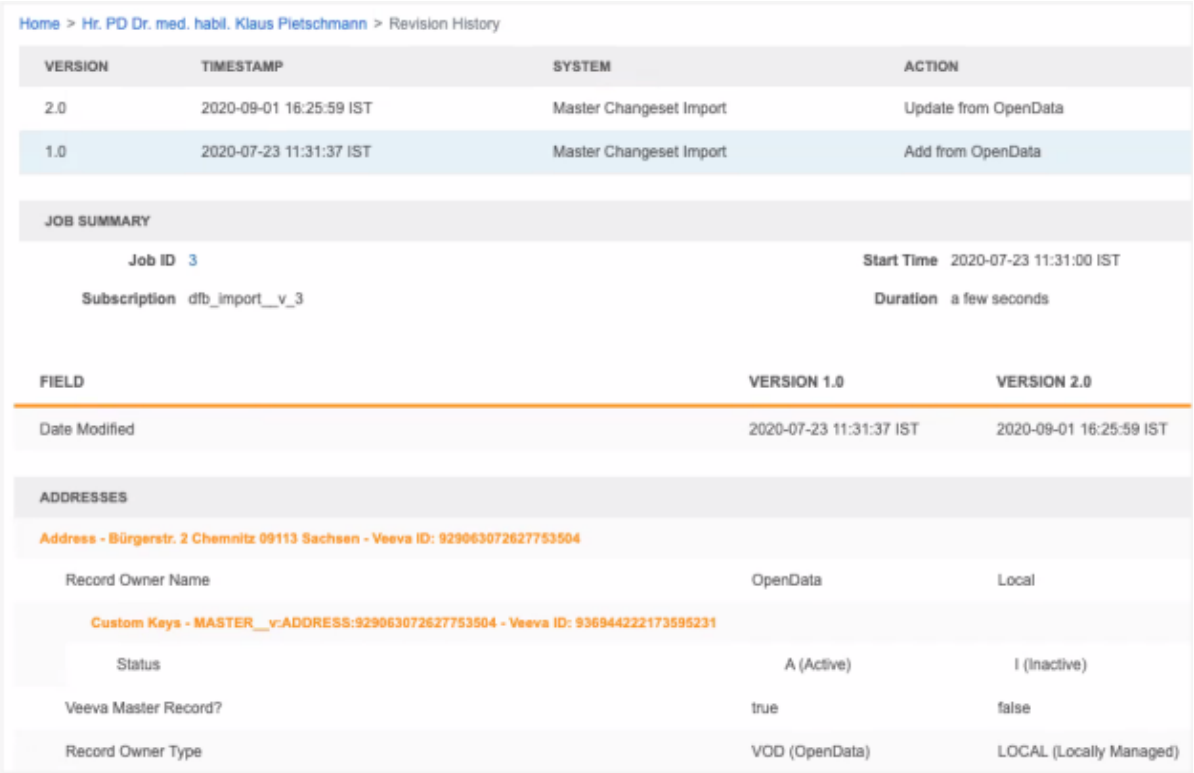
Custom keys

On the new local record, the MASTER_v source key will be inactivated. The MASTER__v source key is added to every OpenData record that is downloaded to your Network instance. A new custom key for the `opendata_opt_outs__v` system is added. That new custom key contains the Network entity ID.



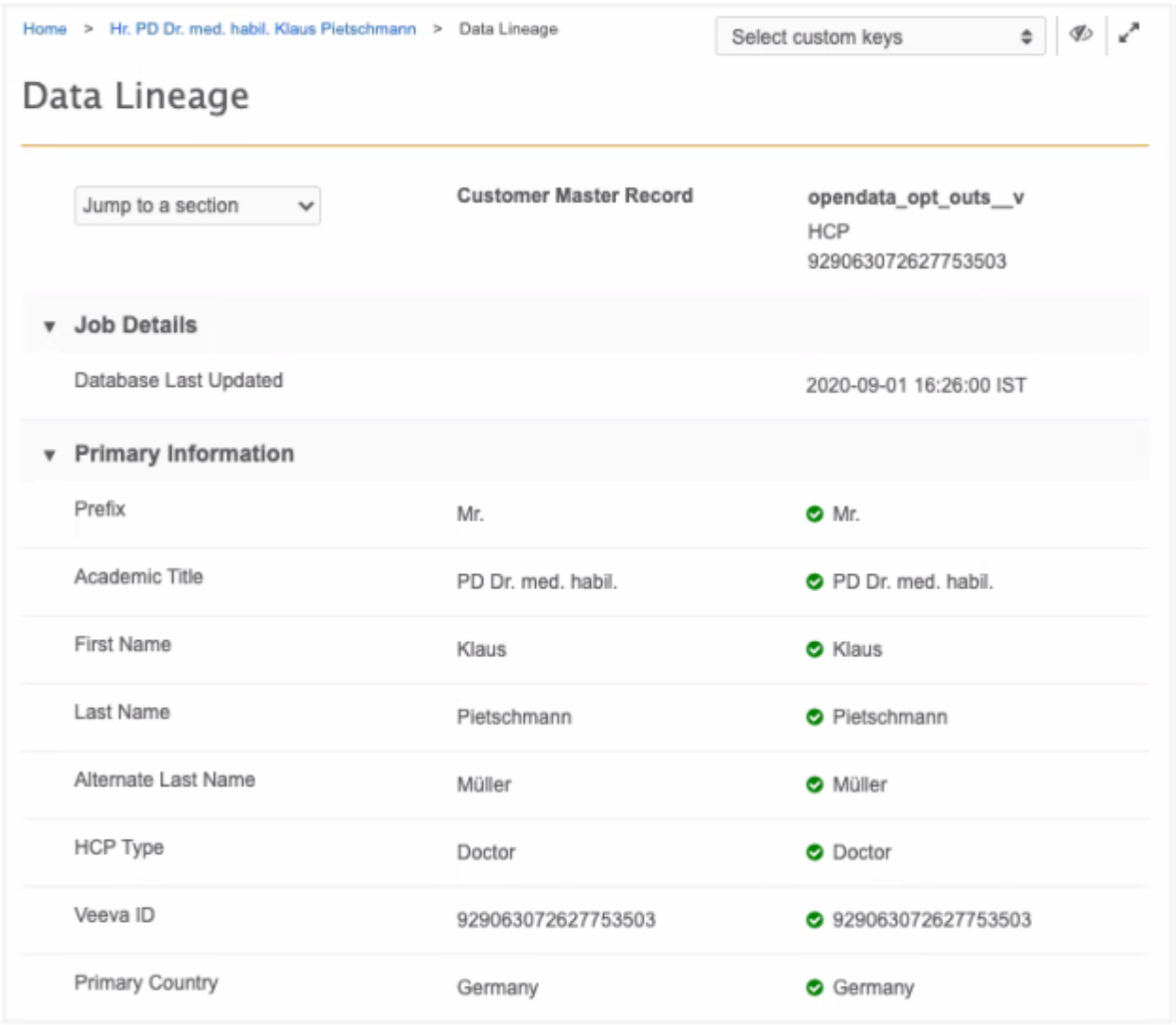
Revision history

In the record's Revision History, you can view the previous revisions and the changes that occurred during the conversion; for example, the change in record owner name and type.



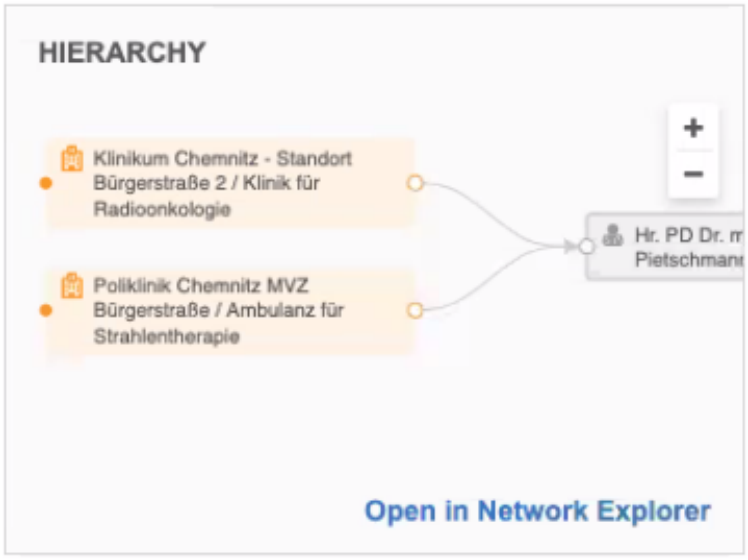
Data lineage

On the data lineage page for the converted local record, all of the OpenData sources are replaced with the new system, `opendata_opt_outs`.



Relationship considerations

If a converted record has relationships to OpenData HCOs, the relationship is converted to a local relationship. You can view these relationships in detail using Network Explorer.



Merge records

After opted-out records are converted into local records, they can be merged into other local or master records as usual.

Change requests

Updates to the converted HCP record will be routed to local data stewards. If the record was not converted to a local record, the DCR is automatically rejected.

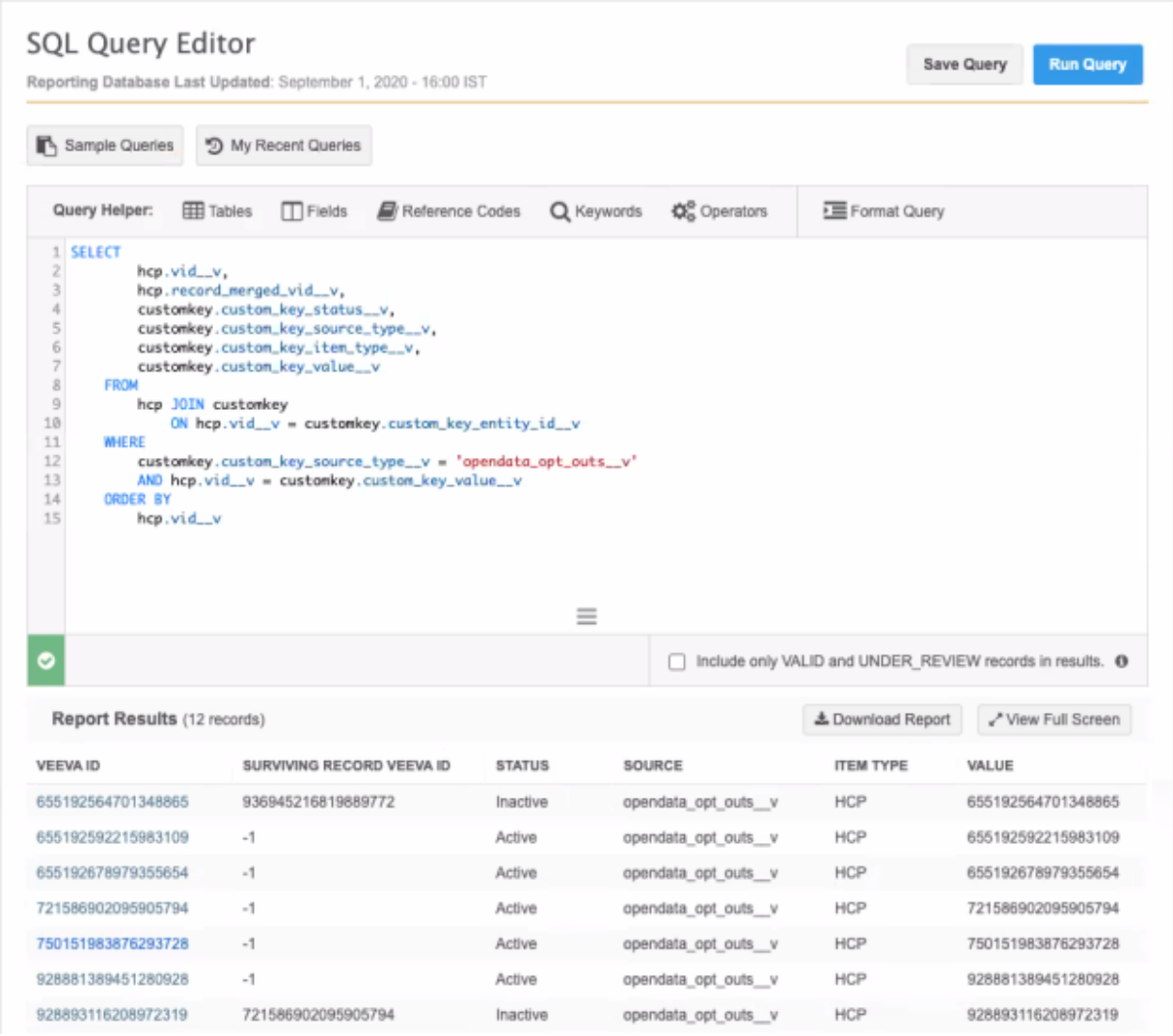
Reporting on converted records

To report on records that have been converted in your Network instance, you can run a SQL query.

Sample query

```
SELECT
        hcp.vid__v,
        hcp.record_merged_vid__v,
        customkey.custom_key_status__v,
        customkey.custom_key_source_type__v,
        customkey.custom_key_type__v,
        customkey.custom_key_value__v
    FROM
        hcp JOIN customkey
            ON hcp.vid__v = customkey.custom_key_entity_id__v
    WHERE
        customkey.custom_key_source_type__v = 'opendata_opt_outs__v'
        AND hcp.vid__v = customkey.custom_key_value__v
    ORDER BY
        hcp.vid__v
```

This query includes merge losers because converted records could be merged into other local records. In the report results, the surviving record ID displays if the record was merged into another record.

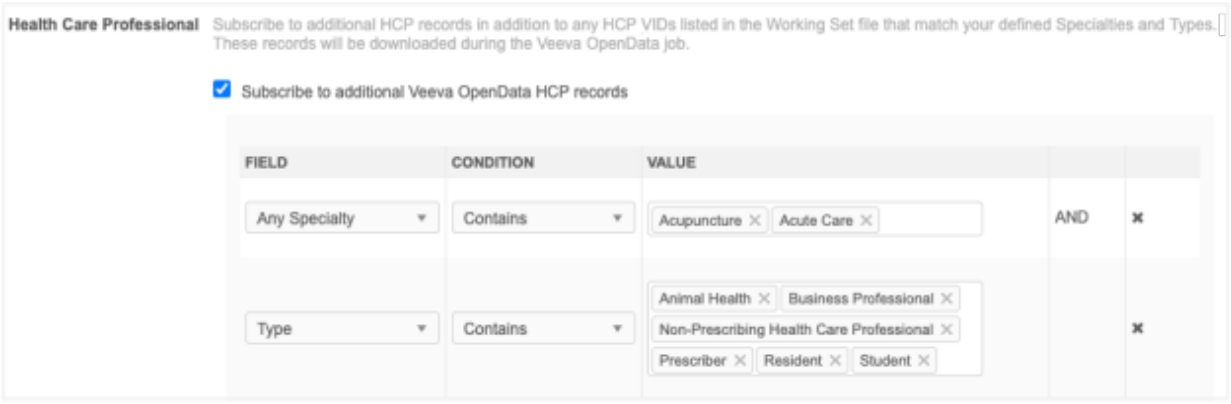


Ad Hoc Download

Converted records cannot be downloaded to your Network instance using **Ad Hoc Download** in an OpenData subscription. If the Network entity ID (VID) of an opted-out record or converted record is added, an error displays.

FILTER LABELS

The filter labels that are used to subscribe to additional HCPs and HCOs in country subscriptions are updated to more accurately reflect how the filters actually work.



Updated labels

The following labels have been updated.

Previous Field Label	Updated Field Label	Description
All Specialties	Any Specialty	The filter looks for the value in any of the fields in the specialty field set: `specialty_1__v` to `specialty_9__v`.
Types	Type	The filter looks for the value in the object type field: `hco_type_v` or `hcp_type__v`.

Source subscriptions

RECORD STATE MANAGEMENT

Administrators and data managers can add a new advanced property to source subscriptions to determine which records should be updated based on record state. Updates to non-valid records (merge losers, invalid or deleted) typically have no benefit because they are not visible in the Network UI. Updates to merge losers after they have been merged are not shared with the winning record. So, although these updates are lost, they are still processed in other subscription jobs (for example, target subscriptions). You can use this property to specify that only Valid records are updated to reduce processing times.

This property is available in your Network instance by default. If the property is not defined, the default behavior (ANY) is applied to new and existing subscriptions to ensure that existing behavior in your source subscription does not change.

New advanced property

Add the property to the **Advanced Mode** in your source subscription to determine the records that are updated.

New property

```
job.merge.allowUpdatesForRecordsWithState
```

Supported values

- ANY (default)
- VALID
- INVALID
- UNDER_REVIEW
- MERGED_INTO

The property supports the non-valid record options because there might be situations where you need to make updates to non-valid records.

This property only applies when updates are done through key matching (using custom keys and/or Network Entity IDs (VIDs)) within a source subscription. Updates to non-valid records should be uncommon because custom keys are typically copied to the surviving record in a merge or inactivated in other situations, so key matching directs the incoming update to the valid record.

Job details

If a source subscription attempts to update a record whose record state is different from the property value in that subscription, a warning displays in the **Job Error** section. You can investigate the incoming updates further; for example, if updates were attempted to a merge loser, you might want to add them to the merge winner.

Target subscriptions

EXPORTED FILES

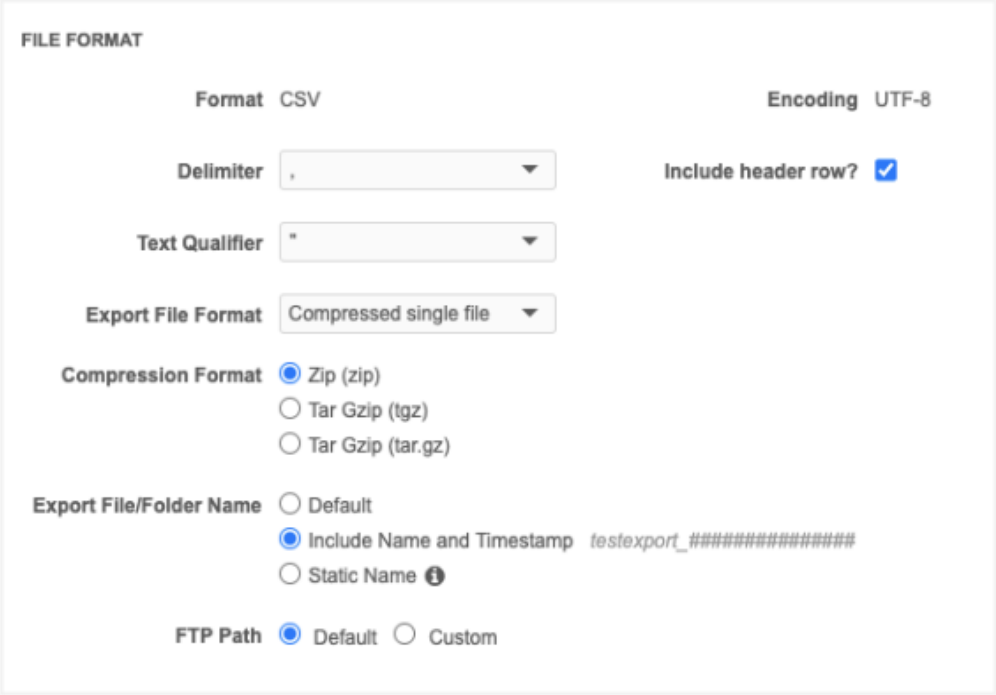
Target subscriptions now contain options for defining the exported file format and file name. This enhancement enables you to have more control over the exported files.

This enhancement is enabled by default in your Network instance.

Define the file format and name

To specify the file details

1. Create or edit a target subscription (**System Interfaces > Target Subscriptions**).
2. In the **General Export Options** section, find the **File Format** heading.
3. Expand the **Export File Format** list and select one of the following options:
    - **Compressed single file** (default) - A compressed file that contains a .csv file for each object.
    - **Compressed individual files** - A compressed file for each object is created.
    - **Uncompressed** - An uncompressed file for each object is created.



4. Choose a **Compression Format**:
    - Zip (zip) - Supported for **Compressed single file** and **Compressed individual files**.
    - Gzip (gzip) - Supported for **Compressed individual files**.
    - Tar Gzip (tgz) - Supported for **Compressed single file**.
    - Tar Gzip (tar.gz) -Supported for **Compressed single file** only.

    If you chose to export an **Uncompressed** file, these options do not display.

5. Beside **Export File/ Folder Name**, choose one of the following options:
    - **Default** - The file exported with the following naming convention: `exp_########`.
    - **Include Name and Timestamp** - The file is exported with the following naming convention: `<subscription name>_YYMMDDTHHMMSSSSS`; for example, `CRM_Target_170113T191503397`.
    - **Static Name** - Define a name so the file will always be exported with the same name. The file and folder will be overridden each time the job runs.
6. **FTP Path** - Choose the **Default** path or create a **Custom** path.

    The default path is `outbound/<system_name>`.

When the target subscription runs, the data will be exported with the format and name that you've specified.

Examples

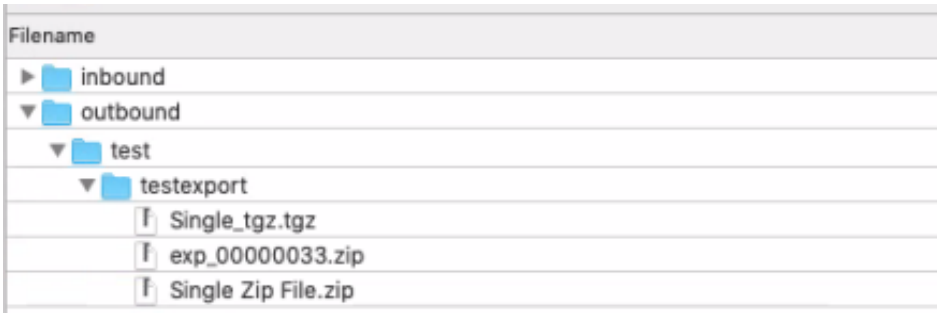
In these examples, the source system and the target subscription have the following names:

- **System** - `test`
- **Target subscription** - `testexport`

Example 1

If you choose to export a **Compressed single file** using the **Default** FTP path, the files are placed in the `outbound/test/testexport` folder.

- Single_tgz.tgz = **Tar Gzip (tar.gz)** file with a **Static Name**.
- exp_00000033.zip = **Zip** file with a **Default** name.
- Single Zip File.zip = **Zip** file with **Static Name**.

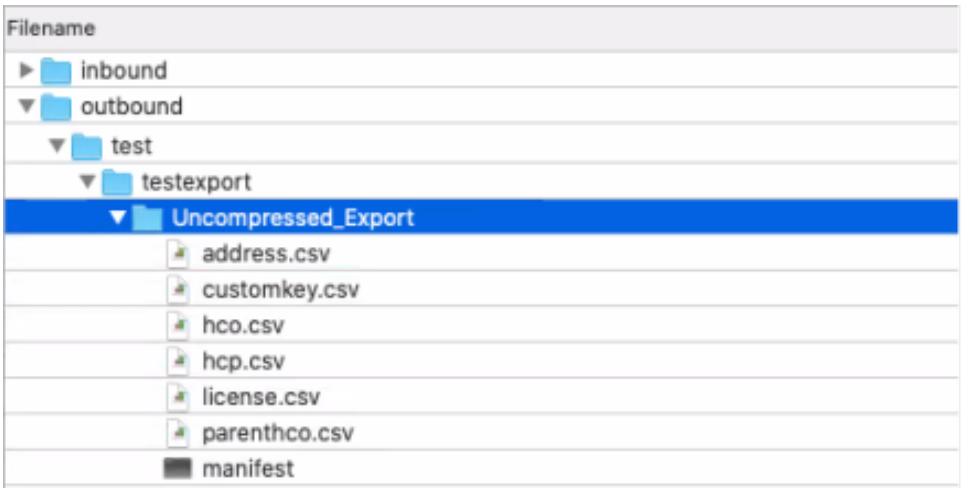


Example 2

If you choose to export **Uncompressed** using the **Default** FTP path, the files are placed in the `outbound/test/testexport` folder.

- Uncompressed_Export = **Static Name**

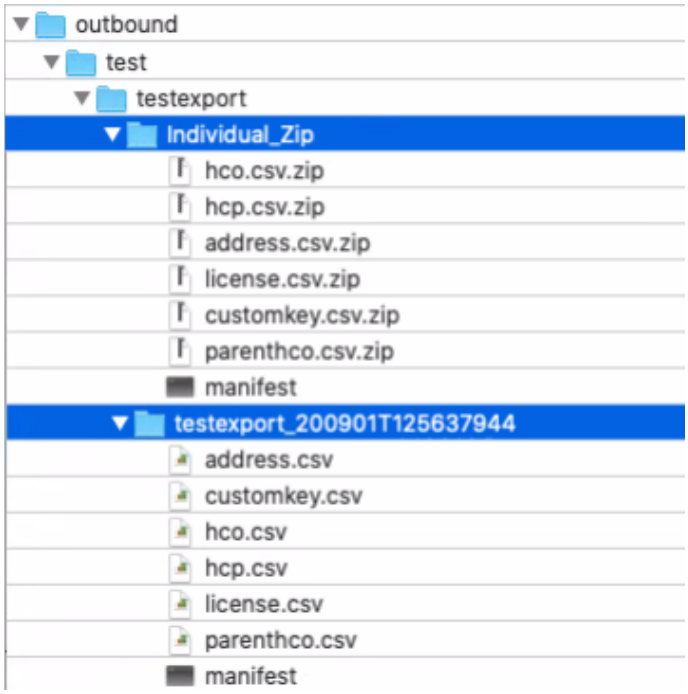
When you choose **Uncompressed**, the files are exported in .csv format.



Example 3

If you choose to export **Compressed individual files** using the **Default** FTP path, the compressed file is placed in the `outbound/test/testexport` folder.

- Individual_Zip = **Zip** file with **Static Name**.
- testexport_200901T125637944 = **Zip** file with **Include Name and Timestamp**.



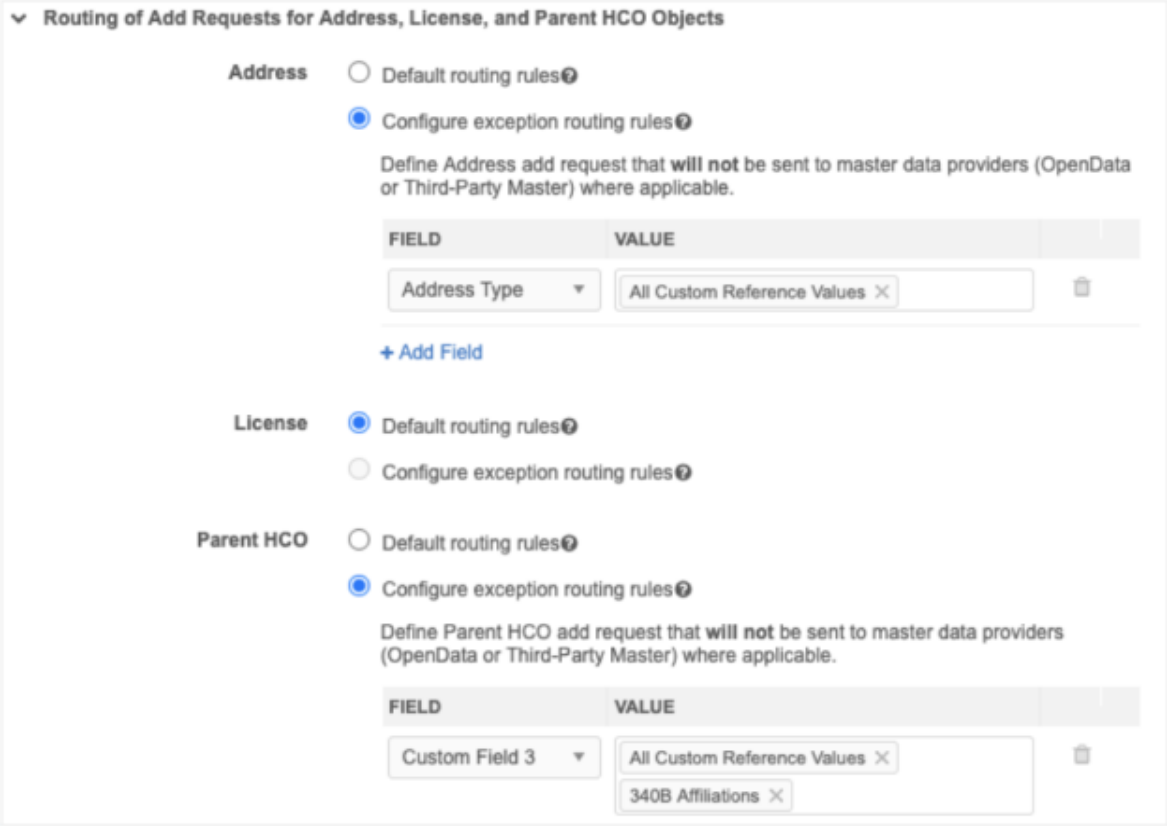
Admin settings

WORKFLOW SETTINGS FOR SUB-OBJECTS

Administrators can now define routing rules in the workflow settings so sub-object (address, license, parent HCO) add requests are routed directly to local data stewards, even if the object is owned by a master data source. Previously, all sub-object add requests for master records were first routed to master data stewards for processing.

- If the add request was accepted, the sub-object was created and a local DCR was routed to local data stewards to process custom fields.
- If the add request was rejected, the DCR was routed to local stewards if the review rejection setting was enabled.

Now, you can define rules to route sub-objects directly to local stewards. For example, if you define a custom address type, you specify that any add requests with that address type are routed.



This feature is enabled by default in your Network instance.

Important:

- If you create a sub-object exception routing rule, contact Veeva Support to update your sub-object comparison rules. These rules are not visible in the Network UI.
- Do not use sub-object routing for addresses and parent HCOs for countries where the Network Address Inheritance feature is enabled.

Sub-object routing rules

A new section called **Routing of Add Requests for Address, License, and Parent HCO Objects** is added to the workflow settings so you can determine where add requests for sub-objects are sent. Change requests for sub-objects are routed to the respective owner.

There are two options for each Veeva standard object (addresses, licenses, and parent HCOs):

- **Default routing rules** - This option is selected by default.

  When add requests are submitted, the following behavior occurs:

  - **OpenData records** - Add requests are sent to OpenData data stewards.
  - **Third party master records** - Add requests are sent to third party master data stewards.
  - **Locally managed records** - Add requests are sent to local data stewards
- **Configure exception routing rules** - Override the default behavior and send add requests for specific sub-object types to local data stewards.

Define sub-object exception routing

You can create an exception for any sub-object add request or for add requests for specific countries.

1. In the Admin console, click **Settings > Workflow settings**.
   - To create an exception for all countries, complete the following steps in the **Default Workflow Settings**.
   - To create the exception for a specific country, expand the **Country Exceptions** section and choose an existing country or click **Add Exception** to define a new country exception.
2. In the **Routing of Add Requests for Address, License, and Parent HCO Objects** section, select **Configure exception routing rules** for the applicable object.
3. In the **Field** list, choose the field for the sub-object. For example, in the **Address** section, choose **Address Type**.
4. In the **Value** list, select values for the type field. For example, choose the `Ship To` custom reference value.

   Note: Rules can only be defined for standard fields with custom reference values and for custom fields that use standard and custom reference values.

5. **Save** your changes.

Add requests submitted with that type are now routed to local data stewards for review.

Exception routing considerations

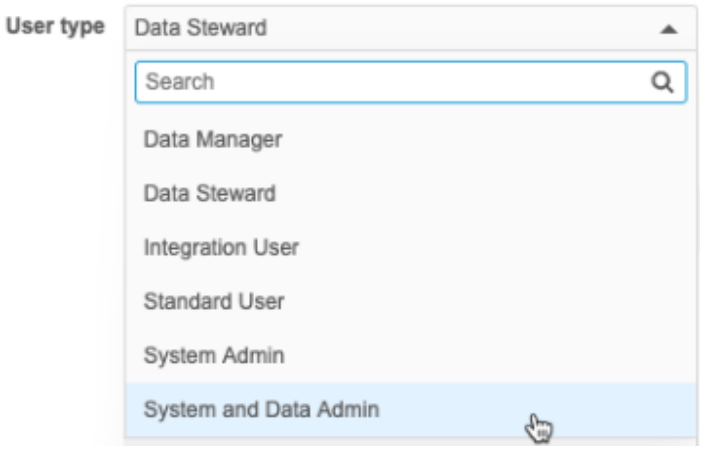
If the add request is for a new master record, the DCR is first sent to the master data steward for processing and then the sub-object is routed to a local data steward.

If an add request for a master record is rejected, the sub-object record state is updated to Invalid and the sub-object will not be routed to local data stewards. If review rejections is enabled, the add request is routed to local data stewards, as usual, regardless of the sub-object type and exception routing.

Users

NEW USER TYPE USER

A new user type called **System and Data Admin** is now available. This user type combines the System Admin and Data Steward capabilities so you no longer need alternate user IDs to completely manage your Network instance.



This new user type is available by default in your Network instance.

User capabilities

As a System and Data Admin user, you have complete access to Network; all the capabilities of the system administrator user plus the data steward user.

Highlights of capabilities

- **Admin console** - All menu items and feature capabilities are available; for example, you can configure and run subscriptions and data maintenance jobs; view and edit the data model; create users; configure Network widgets, and view audit logs.
- **Home dashboard** - Network displays the administrator's home dashboard when you log into Network. All dashboard widgets are available to you.
- **Ad Hoc Match** - Jobs created by all users are listed.
- **Inbox** - All jobs and data change requests display and are ordered by newest tasks. You have full data steward capabilities for data change requests. If you open a task that is not assigned to another user, the task is automatically assigned to you.
- **Data change requests** - Any type of task can be processed (add or change requests and suspect matches). Also, if the workflow settings are configured to review rejections by Veeva OpenData, record changes that you make will be automatically accepted. The resolution note for these requests will display: *System approved - created by data steward*.
- **Reports** - All reporting capabilities are available.
- **Network Explorer** - You can view and edit hierarchies.
- **Data Updater** - Jobs for updating or merging records can be created.

- **Record profiles** - All of the data steward capabilities are available to you.

  This includes the following capabilities:

  - Find Suspect Match (for local records)
  - Viewing and processing associated tasks
  - Access to the **Validate** button to run data validation rules.
  - Access to the **Send to OpenData** button to send a record to OpenData for ownership change.
  - Promoting or rejecting candidate records
  - Managing multi-country HCPs
- **Data validation rules** - This user type is automatically added to existing rules and new rules and cannot be removed.
- **Reporting** - Access to all Network reporting capabilities, including viewing and editing reports saved by other users.

Create a new user

To create a user with this new type:

1. In the Admin console, click **Users & Permissions > Users**.
2. On the Users page, click **Add User**.
3. On the Add New User page, define the **Username** and **Email**.
4. In the **User type** list, select **System and Data Admin**.
5. The **Inbox Task Groups** field is automatically populated with the **Data Loading Jobs** and **Data Stewards** groups. This ensures the user has data change requests and job warnings in their inbox.
6. Configure the remainder of the user profile as usual.

The new System and Data Admin user has the same default settings as a Data Manager. Also, the **SQL Query Editor** and **Data Quality Report Access** permissions that display when you create a Data Steward user also display but default to **Allow**; Data Stewards do not have access to these features by default.

SWITCHING EXISTING USERS

Administrators can switch user types for an existing user. For example, if you have IDs for a data steward and a system administrator, you can switch one of these IDs to the System and Data Admin user type.

When you switch a user type in the user's profile, the user type changes but data permissions and settings are not updated automatically. You must adjust permissions for the System and Data Admin user to they have access to the data and settings they need.

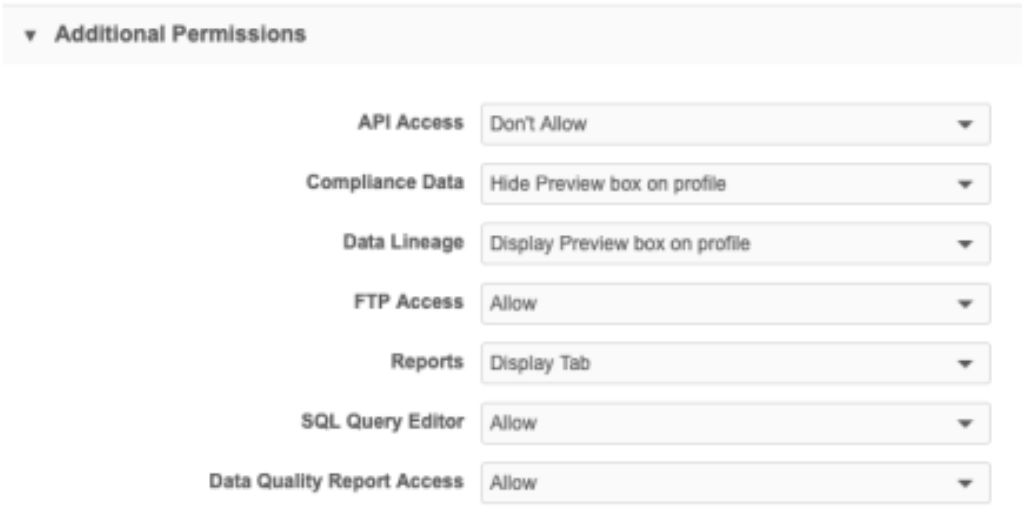
Consider switching the most active Network user with access to as many groups and features as possible. The newly updated user should belong to the superset of groups from each of the previous users.

After you've updated one of the user types, remember to inactivate users you no longer need.

Switching from a data steward user type

When switching from a data steward to System and Data Admin type, you might want to manually adjust the following settings so the user has all of the intended capabilities:

- **Inbox Task Group** - Add the **Data Loading Jobs** group.
- **Data Updater - Merge Records** permission - Change to **Allow**.
- **FTP Access** permission - Change to **Allow** or **Allow Directory**.
- **SQL Query Editor** permission - Change to **Allow**.
- **Data Quality Report Access** permission - Change to **Allow**.

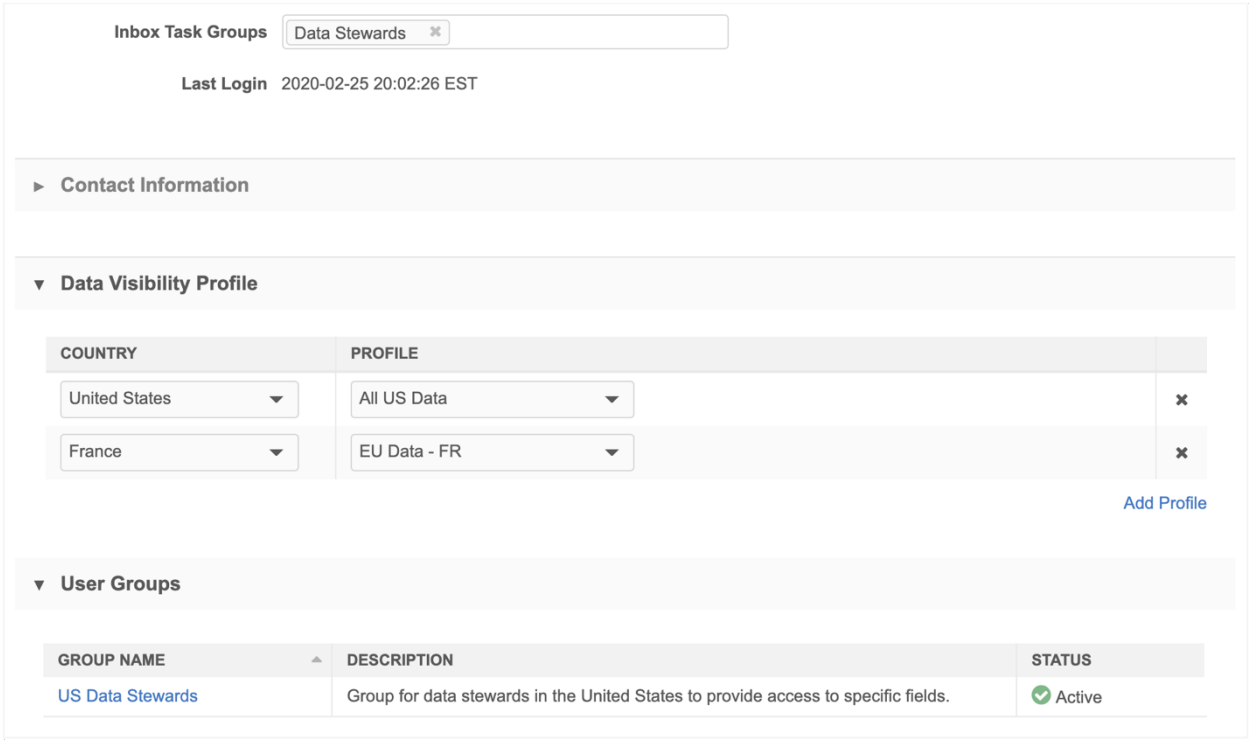


Switching from an admin user type

When switching from an admin user to System and Data Admin type, you will likely have a number of groups and profiles to assign to the new user type.

Update the user profile to include all new groups and data visibility profiles:

- **Inbox Task Group** - Add relevant inbox task groups.
- **User Groups** - Add relevant user groups.
- **Data Visibility Profiles** - Add data visibility profiles for relevant countries and data sets.

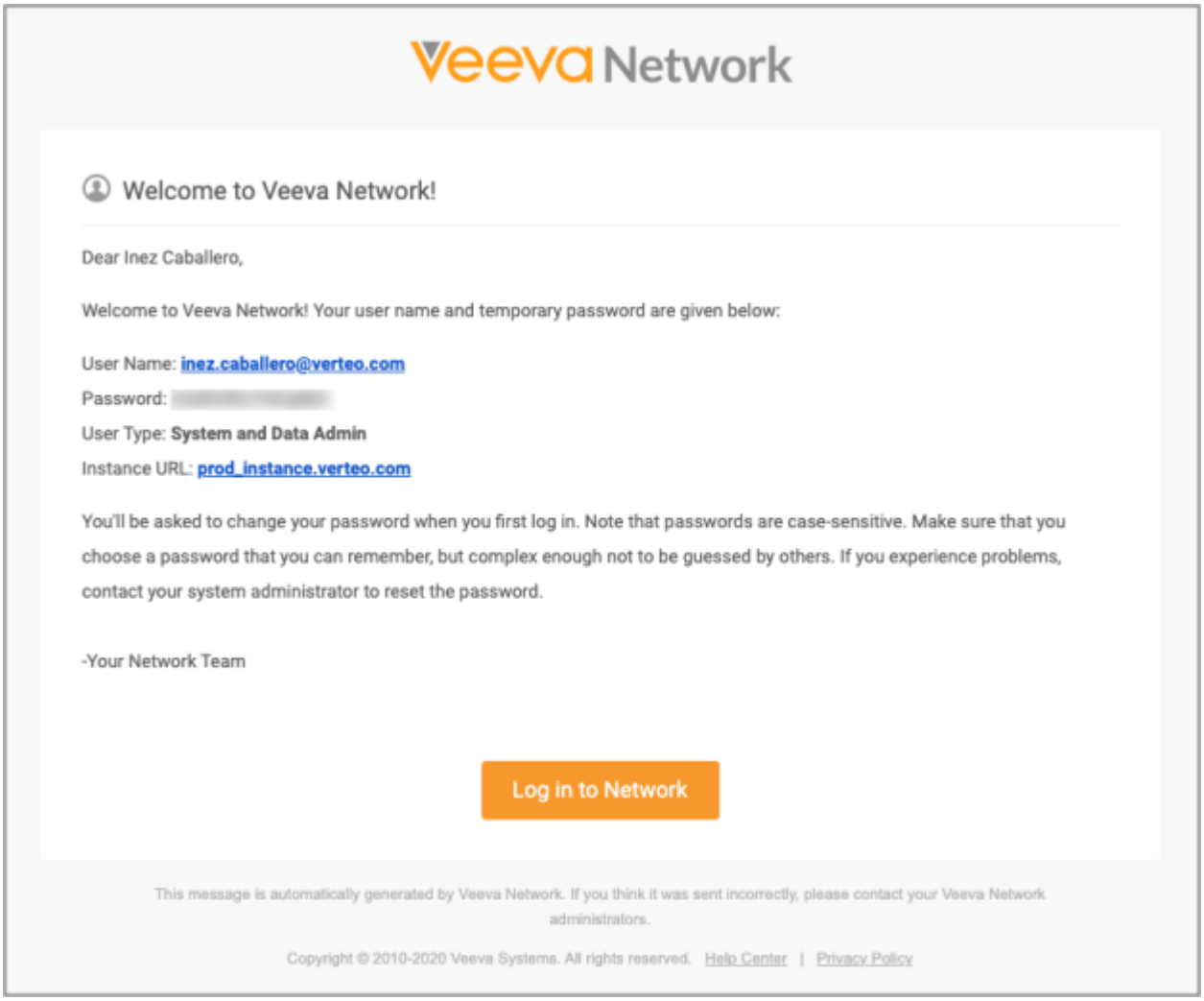


Provisioning new instances

When a new Network instance is created, the user type that is created will now be a System and Data Admin. Previously, the provisioned user was a System Admin.

WELCOME EMAIL

The new user welcome email now includes the user type and Network instance URL details. Previously, only the user name and temporary password were included in the email details.



When administrators create new users, a welcome email is sent to the user if the **Generate temporary password and notify user option** is selected. Users can click **Log In to Network** to navigate to the instance's login page to change their temporary password.

This enhancement is enabled by default.

Network integrations

MIGRATION TO NETWORK BRIDGE

Network instances that use the CRM Data Subscription to export data from Network to CRM will automatically be migrated to the Network Bridge. The Network Bridge enables you to run and monitor these data subscription jobs within Network.

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

Note: The previous version of the CRM Bridge that uses the CRM Data Subscription will be sunset in Veeva CRM version 20R3.0

For more information, see the Network Bridge topic in the *Veeva Network Online Help*.

Migration process

Initiate the migration

Contact Veeva Support to create a support ticket for the migration. Provide your Network environment and the CRM 18-digit Org ID.

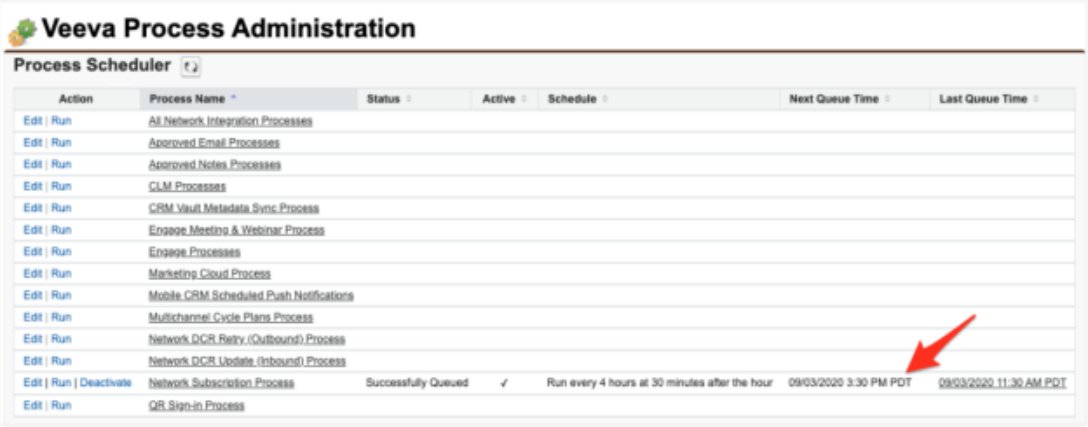
Pre-migration checks

Validate the following details prior to the migration to ensure the migration is successful:

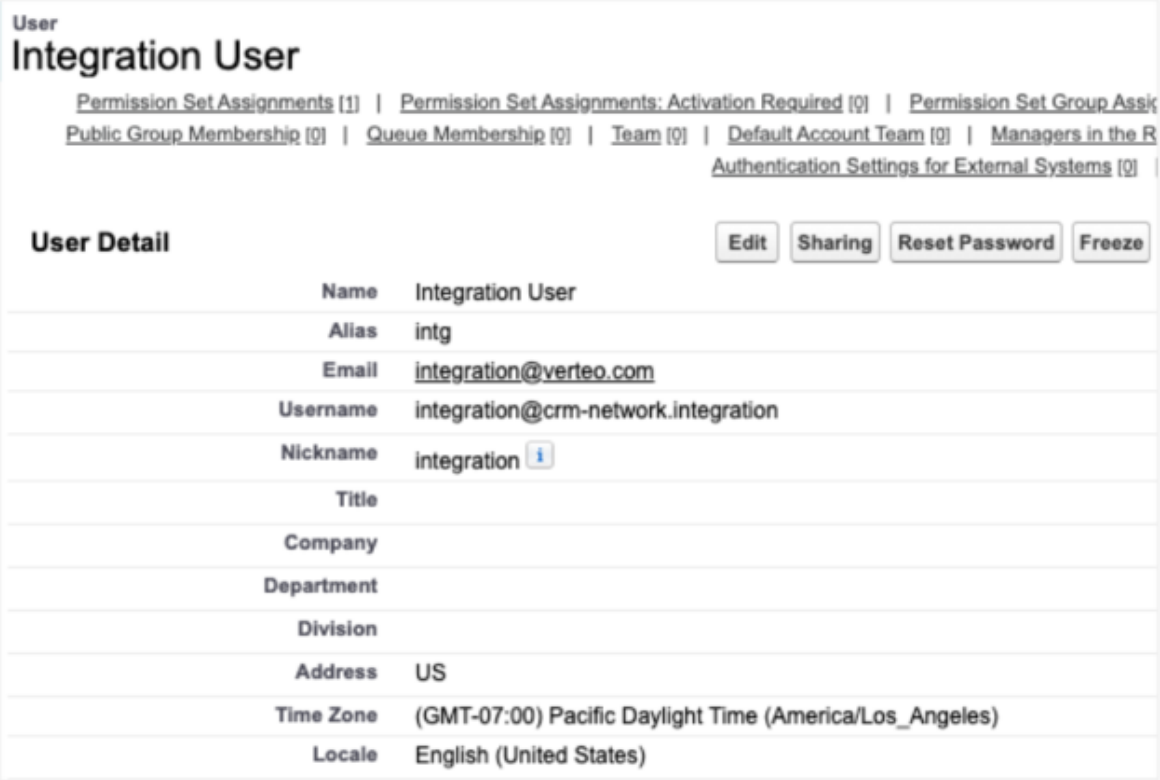
- **Network Integration user** - Ensure that the user in CRM is a valid user in your Network instance.
- **CRM Integration user** - Ensure that the credentials are valid.
- **CRM data subscriptions** - A valid country must be populated for each subscription.
- **Target subscriptions** - Ensure they exist and are linked to the correct CRM system.
- **Subscription schedules** - For schedules to migrate successfully, the CRM integration user's timezone must be the same as the timezone that is set in the Veeva Process Scheduler.

  Example

  On the Process Scheduler page, note the timezone that displays in the **Next Queue Time** column.



Verify that the **Time Zone** that is set on the CRM Integration User's details page (**Setup > Administration Setup > Manage Users > Users**) matches the timezone for the Process Scheduler.



Migration details

Migration steps occur in your CRM org and your Network instance.

CRM org

The following actions occur in your CRM org:

- **Credentials verified** - The Salesforce credentials and the Integration User's credentials for your CRM org are used to verify that the migration is occurring on the correct Network instance.
- **CRM data subscriptions** - Existing data subscriptions are removed so they will no longer run.
- **Veeva Process Scheduler** - The Network Subscription Process scheduler is deactivated. The existing schedules will be replicated on the new Network Bridge jobs that are created in your Network instance.

Network instance

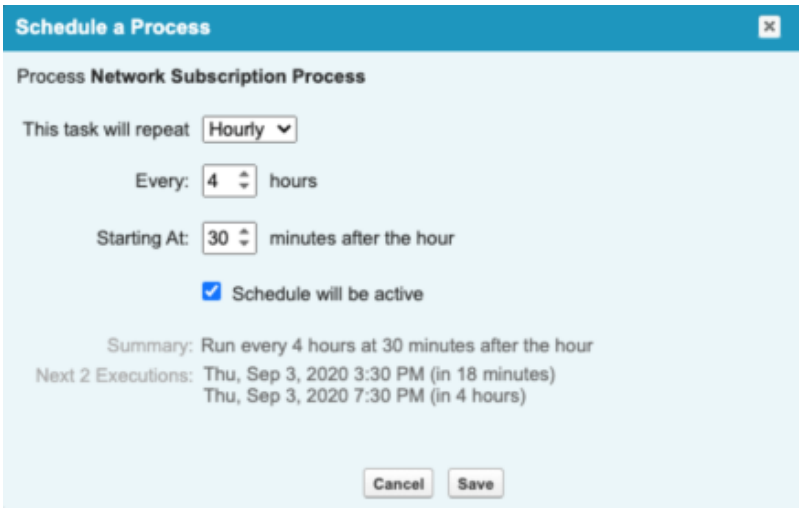
The following actions occur in your Network instance:

- **External Credentials** - A CRM org credential is created (**Settings > External Credentials**).
- **Network Bridge subscription**s - New subscriptions are created to replace the CRM data subscriptions. Each subscription name has a `bm_` prefix to identify it as a migrated subscription (**System Interfaces > Network Bridge**).
- **Subscription schedules** - The schedules that you had on your CRM data subscription are created for your new Network Bridge subscriptions.

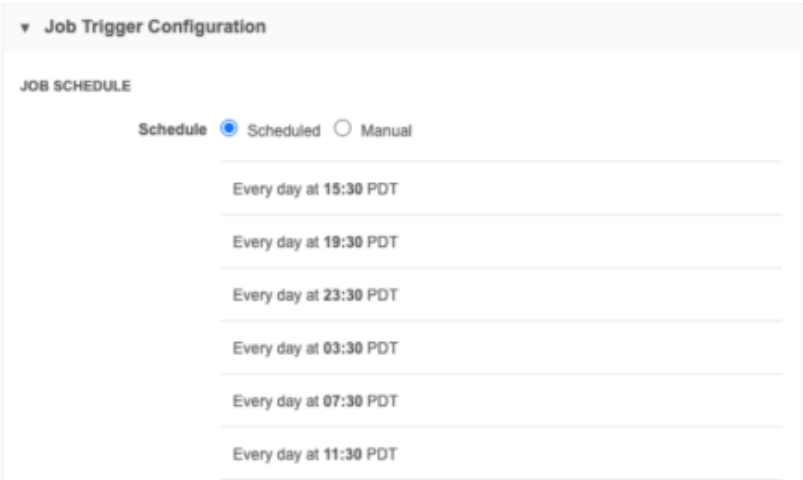
  Hourly schedules might display differently in Network. For example, if your CRM data subscription has one hourly schedule set for every 4 hours, the Network schedule has several daily schedules set for four hours apart.

  Example

  CRM Process schedule



  Network schedule



Network Bridge subscription jobs

The first time a Network Bridge subscription runs, it is a full run (delta starts at 0). If the export options on the target subscription are set to **Delta**, the subsequent run will pick up the delta.

INCREMENT DELTA IDS FOR VEEVA CRM

Network now increments the delta ID for entities related to rejected data change requests so records remain synced between CRM and Network.

Veeva CRM users can immediately save updates to DCR_Editable fields in CRM before the changes are processed by data stewards. However, if the data change request is rejected, the record is not considered changed in Network and is not included in the subsequent target subscription. This means the field value in CRM is now out-of-sync with Network. To prevent this, Network will increment the delta ID for any rejected DCRs so the target subscription includes the record to update CRM.

For example, if you configure email fields as DCR_Editable in CRM, when a user updates an email in CRM but it is rejected in Network, the target subscription updates the record in CRM so the email value becomes synced with Network again.

This enhancement is enabled by default in your Network instance.

VEEVA CONNECTOR FOR NITRO

The Veeva Connector for Nitro is updated to use Intelligent Load. The runTaskJob in the CTL file will be set to `jb_ftp_intelligentload__v`. To support Intelligent Mode, the Nitro Connector jobs will export individual .gz files to your FTP server. Previously, .zip files were exported. Using .gz files avoids issues that occurred when Network uploaded the files because of special character handling for .csv files.

These changes are enabled by default.

Network API

SEARCH FILTER EXCLUSIONS

Integration users can now exclude records from search results using custom fields without excluding Veeva OpenData results. Previously, any filters used on custom fields automatically excluded OpenData-only records because those records do not have the custom field. You can use custom fields to identify the records that you want to exclude while still being able to search OpenData.

The exclusion filter supports the following:

- Multiple values
- Scoped entities
- Field sets
- Parent HCOs

NOT EQUAL

Use this exclusion filter to exclude objects from the search results if the object contains a certain value on a field. If **Search against OpenData** is enabled in the Network instance and the exclusion filter is on a custom field, OpenData records could be included in the results.

Example

Verteo uses a custom field `top_institution__c` to identify Top Institution Accounts. They want to exclude HCO records where `top_institution__c` = Y in Veeva CRM, because including them will cause an issue for roll-up reports. Verteo still wants reps to be able to search for other HCOs that do not have `top_institution__c` = Y (including OpenData records).

API call

```
{{URL}}/api/v21.0/search?q=*&excludefilters=top_institution__c:Y
```

NOT IN

Integration users can use this filter to exclude records from the search results if the record contains a value from a set of values on a field.

If **Search against OpenData** is enabled in the Network instance and the exclusion filter is on a custom field, OpenData records could be included in the results.

Example

Verteo wants to exclude objects that have a primary pediatric specialty. OpenData has multiple specialty values for different types of pediatricians.

API call

```
{{URL}}/api/v21.0/search?q=*&excludefilters=specialty_1__v:CPP,PMG,PPM,PDM,
EMP,PD,PDN,CHC
```

Note: This example excludes the records that contain a value in the `specialty_1__v` field. To exclude records that contain the value in any of the specialty fields, see "Field sets" below.

Parent HCO

Parent HCOs can be excluded from the search results. The Parent HCO filters should filter the search results from the parent_hco__v section and the supplementalResults section.

Example

Verteo wants to exclude hospital departments in search results. The reference code for hospital departments is `4:1`.

API call

```
{{URL}}/api/v21.0/search?q=*&excludefilters=hco_type__v:4:1&parenthcoexclud
efilters=hco_type__v:4:1
```

Field sets

Use exclusion filters to search an OR condition across field sets during search.

Supported field sets:

- **specialty** (specialty_1__v to specialty_10__v)
- **credentials** (credentials_1__v to credentials_5__v)
- **medical_degree** (medical_degree_1__v to medical_degree_5__v)

Example

Verteo wants to exclude entities with a Pediatric specialty. OpenData has multiple specialty values for different types of Pediatricians.

This API call excludes records that has these values in any of the specialty fields (specialty_1__v to specialty_10__v)

API Call

```
{{URL}}/api/v21.0/search?q=*&excludefilters=specialty:CPP,PMG,PPM,PDM,EMP,P
D,PDN,CHC
```

Using with the parent HCO exclusion filter

You can also apply field sets to the parent hco filter.

API call

```
{{URL}}/api/v21.0/search?q=*&excludeparenthcofilters=specialty:CPP,PMG,PPM,
PDM,EMP,PD,PDN,CHC
```

Scoped objects

You can apply field sets to entity-scoped exclusion filters during search.

Example

Verteo wants to exclude HCPs with a pediatric specialty. OpenData has multiple specialty values for different types of pediatricians.

API call

```
{{URL}}/api/v21.0/search?q=*&excludefilters=hcp.specialty:CPP,PMG,PPM,PDM,EMP,PD,PDN,CHC
```

Using multiple filters

Integration users can use multiple exclusion filters for search. The filters should be "AND" together.

Example API call

```
{{URL}}/api/v21.0/search?q=*&excludefilters=hcp.specialty:CPP,PMG,PPM,PDM,EMP,PD,PDN,CHC&excludefilters=hcp.hcp_type__v:P
```

Example API call - multiple parent HCO exclusion filters

```
{{URL}}/api/v21.0/search?q=*&parenthcoexcludefilters=hco_type__v:4:1&parenthcoexcludefilters=is_veeva_master__v:Y
```

Search widget filters

The exclusion filter can be used on preset filters for the search widget.

Widget filter

```
preset-exclude-filter="hcp.specialty_1__v=A"
```

You can also use exclusion parenthco filters on preset filters.

Widget filter with parent HCO filters

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