Veeva Network 21R1.1.1 Release Notes

June 2021

Contents

About these Release Notes

These Release Notes describe all features that are included in Veeva Network 21R1.1.

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

Browser requirements

These are the minimum browser requirements for Veeva Network:

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

Veeva Network is not supported on mobile devices.

Release Note updates

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

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

What's new

The following key enhancements comprise the Veeva Network 21R1.1 minor release.

		ST	DS	DM	AD
General updates					
HCO icons	Two new icons have been added and more HCO types have been mapped to existing HCO icons.	●	●	●	●
Chinese names	Chinese full names that contain the special interpunct (.) character will now be split into the first name and last name fields.	●	●	●	●
Network Portal					
Advanced settings - Search widget	The Search widgets settings in applications are updated to include options for restricting search results, downloading, and editing records.	●	●	●	●
Advanced settings - Affiliation widget	The Affiliation widget settings for applications are updated to include options for restricting editing and for displaying HCO metrics.	●	●	●	●
Network widgets - General					
Profile layouts	The primary country field is added to the predefined NetworkWidgetsLayoutHCO and NetworkWidgetsLayoutHCP profile layouts.	●	●	●	●
Affiliation widget					
Bulk editing	Users can select multiple HCP and HCO accounts to reposition, copy to another view, or remove from the current view.	●	●	●	●
Display relationship info	You can now choose how to display relationship information on the Influence Map.	●	●	●	●
Reposition labels	The relationship labels on the connecting lines between two entities can be repositioned.	●	●	●	●
Filter by HCO/HCP	HCPs and HCOs can be filtered on the Influence Map.	●	●	●	●
Editing profiles	Records can be updated directly from the profile preview.	●	●	●	●
Account list updates	The entity layout field for HCPs now displays on records in the Account List.	●	●	●	●
Removing standard views	Standard views can no longer be deleted from the Influence Map.	●	●	●	●
Full screen support	The Affiliation widget is supported in full screen mode for Salesforce Classic™.	●	●	●	●

		ST	DS	DM	AD
Search widget					
Search local records only	A new property can be used to limit search results to records in your Network instance.	●	●	●	●
Data components					
View external data	Use this new feature to view HCP, HCO, and custom object data from Salesforce in your Network instance.	●	●	●	●
Reports					
SQL Query Editor	You can now drag and drop tables, fields, and reference codes from the tree view into the query box.			●	●
Reporting permissions	Use a new user permission called **Report Results** to run reports without any data restrictions applied.			●	●
Profile layouts					
Usability enhancements	Profile layouts are updated to provide more information about each configuration and where it is being used.			●	●
Source subscriptions					
Loading relationships	Parent HCOs will be dropped or rejected if the related entity does not have a Valid record state.			●	●
Match					
Formatted name field	The formatted name field for HCPs is now available to add to data groups and match rules in match configurations.			●	●
Data validation rules					
Custom object support	Rules can now be created for custom objects.			●	●
Operand support for field sets	Operands can be used for field sets to create rules to check for a specific count of sub-objects or relationship objects.			●	●
Data validation rules page	The page is updated so you can more easily view the objects and rules.			●	●
Disabling fields	When you disable a data model field, the confirmation message now lists the impacted data validation rules.			●	●
Profile page updates	The right pane on record profiles remains fixed so Data Stewards can view data validation issues as they scroll.	●	●	●	●

		ST	DS	DM	AD
Configuration Management					
Custom object dependencies	You can now remove data domains from export packages if there is at least one domain in the package for the main custom object.				●
Opt out matching settings	The Opt Out Matching Settings can now be exported to target environments.				●
API					
Batch Approve/Reject Change Request	You can now insert resolution note comments or codes for each data change request (DCR) when they are automatically accepted or rejected using the Batch API calls.		Developer		

Note: The System and Data Admin user has all 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.

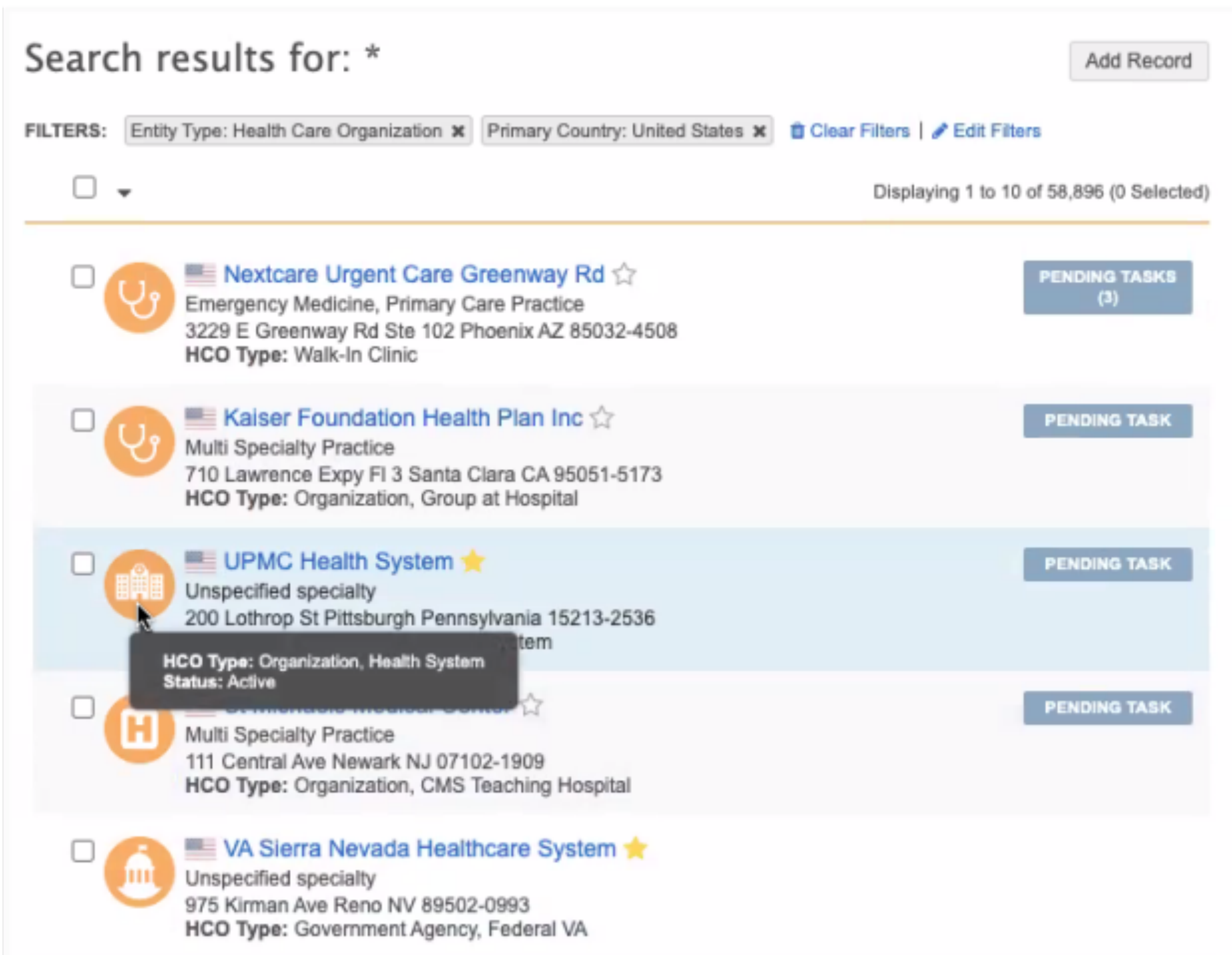
General updates

HCO ICONS

The HCO type icons have been extended to include HCO types that are commonly used in Europe. In addition, new icons have been added to improve branding for dentistry and infusion centers.

The HCO icons help you easily differentiate HCO types when HCOs have the same name. They are used for all record owner types (local, Veeva OpenData, third party data providers) and all record states.

These new specific HCO icons will be used throughout the Network UI, the Network Portal, and Network widgets. They are enabled by default.



New HCO icons

New icons have been added to identify dentistry and infusion centers.

HCO Type		HCO Type Name	Reference Code
Dentistry		Organization, Dentistry Group	4:18
Infusion Centers		Dialysis & Infusion Centers	29:1
		Blood Transfusion Centers	3_6
		Dialysis & Infusion Centers, Other	29:98
		Dialysis & Infusion Centers, Corporate Office	29:99
		Dialysis & Infusion Centers, Hospital-based Dialysis/Infusion	29:2

New icon mappings to HCO type

HCO types that are commonly used in Europe have been mapped to the existing HCO icons.

HCO Type		HCO Type Name	Reference Code
Distributor		Distributors, General	4_4
Extended Care		Hospice	4_71
		Nursing Home with Pharmacy	NHP
Government Agency		Health Care System Administration, Government Health Administration	36_1
		Health Care System Administration, Other Administration Agencies	36_4
		Health Authority/Board	28:1
		Government Agency, Federal Public Health Service	26:11
		Organization, Government	4:13
Group Practice		Primary-level Medical and Health Care Institutions, Community Health Service Center	3_2
		Primary-level Medical and Health Care Institutions, Village Clinic	3_1
		Primary-level Medical and Health Care Institutions, Clinic/Healthy Center	3_4
		Organization, Single Private Practice	4_91
		Organization, Shared Practice	4_41

HCO Type	HCO Type Name	Reference Code
Health Systems	Legal owning entity of hospitals and clinics	LE
	NHS Trust	36_10
	Commissioning Region	36_7
	Clinical Commissioning Group	36_6
	Area Team	36_5
	Health Boards/Trusts (Devolved UK nations)	HB
Hospital	Hospital, Other Specialized	32_11
	Hospital, Teaching and University	4_56
	Hospital, Oncology	1_21
	Hospital, Dermatology	1_10
	Hospital, Military	1_1
Hospital Department	Organization, Clinic at Hospital	4:7
	Department	5
Institution	Medical School, Pharmacy	14:10
	Medical School, Nursing	14:6
	Medical School, Dental	14:5
	Medical School, Psychology	14:14
Laboratory	Ancillary Services, Medical and Diagnostic Laboratories	33_2
Pharmacy	Drugstore (OTC Only)	11_13
	Pharmacy, Large Retail Chain	11_15
	Pharmacy, Retail Multiple	11_16
	Pharmacy, Community	11_18
	Pharmacy Group	11_14

HCO icon use in the Network UI

The HCO type icons display wherever icons are used in the Network UI; for example, on record profiles, search results, the inbox, Network Explorer, Recent items, and so on.

Note: Any HCOs that were in your **Recent Items** before this release will continue to display the standard HCO icon until you reopen the record.

For more information about where HCO type icons are used, see HCO icons in the *Veeva Network Online Help*.

CHINESE NAMES

Chinese full names that contain the special interpunct (.) character will now be split into the first name and last name fields. Previously, the full name was copied into the first name field only. Now, names that contain this special character will be used to split the full name into first name and last name fields.

This enhancement is enabled by default in your Network instance.

Previous behavior

Previously, Chinese full names were copied to the first name field only.

Full name	Last Name	First Name
阿达莱提.夏吾东(Ada Lai Ti. Xia Wu Dong)		阿达莱提.夏吾东(Ada Lai Ti. Xia Wu Dong)

New behavior

The full name is split at the special (.) character. The last name is the full name value before the interpunct character (.) and the first name is populated with the value after the special character.

Full Name	Last Name	First Name
阿达莱提.夏吾东(Ada Lai Ti. Xia Wu Dong)	阿达莱提 (Ada Lai Ti)	.夏吾东 (.Xia Wu Dong)

Note: This enhancement does not impact Chinese names that do not contain the special character.

Network Portal

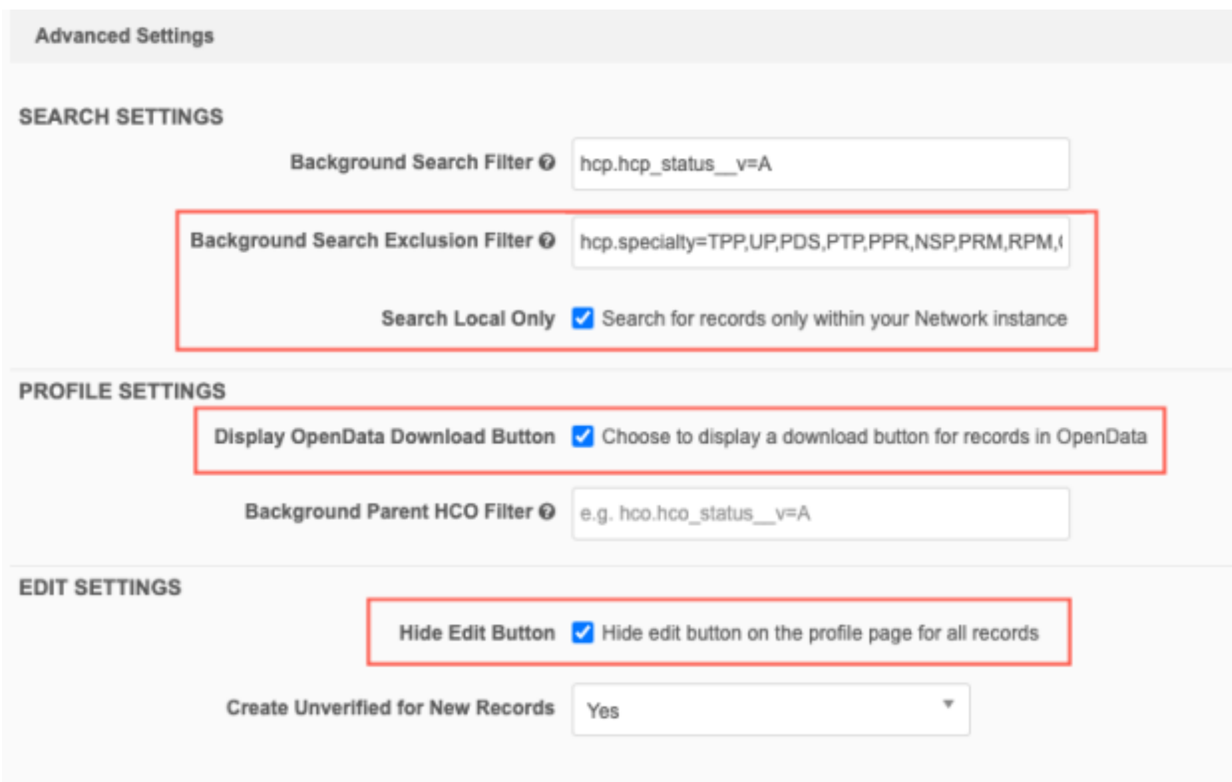
The Advanced Settings for the Search widget and Affiliation widget have been updated to include specific settings to customize your Network Portal applications.

ADVANCED SETTINGS - SEARCH WIDGET

In Network Portal applications, the **Advanced Settings** section for Search widgets is updated to include specific settings for searching, downloading, and editing records.

New advanced settings

- **Search Local Only** - Search results display records that exist only in your Network instance. Records that have not yet been downloaded from Veeva OpenData will not display. This can help to reduce search results and prevent users from seeing results that are not relevant.
- **Background Search Exclusion Filter** - Excludes specific records from all search results.
- **Display OpenData Download Button** - Choose whether users can see the option to download the record from Veeva OpenData.
- **Hide Edit button** - Do not display the Edit button on the profile page to prevent users from making changes to data.



These settings are available by default. You can choose to enable each setting for your Network Portal application.

Enable the settings

In the Admin console, click **Widgets & Portal > Network Portal**.

1. On the Network Portal page, open an application that contains a Search widget; for example, the Search Accounts application.

   In the **Widget Configuration** section, the defined Search widget contains the **Advanced Settings**.
2. Select any settings that you want to add to customize your application.
3. **Save** your changes.

Search settings

Search local records

Administrators can choose the **Search Local Only** setting to restrict search results to records in your Network instance. By default, this setting is not selected. Using this setting returns a significantly fewer number of results and prevents users from seeing records that might not be relevant.

Note: This setting affects the Search widget in the Network Portal application only, but there is now a property that you can add to Search widgets for other internal applications. For more information, see the "Search widget" topic in these *Release Notes*.

Background Search Exclusion Filter

Use this setting to exclude specific records from all search results. For example, if the product and therapeutic area for the health system does not apply to HCPs in pediatric medicine, you can exclude those records from all searches.

This filter uses API syntax.

Example API syntax to exclude HCPs with specialize in pediatrics

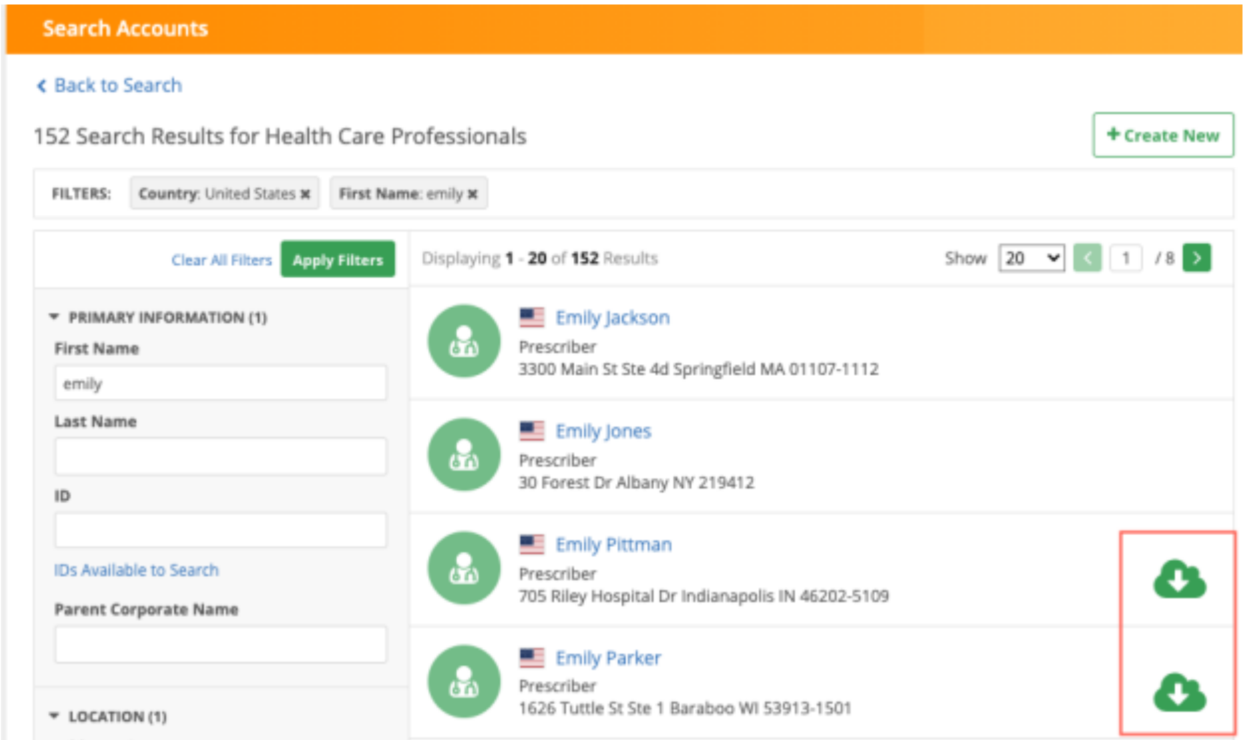
```
hcp.specialty_1__v=PD
```

Profile settings

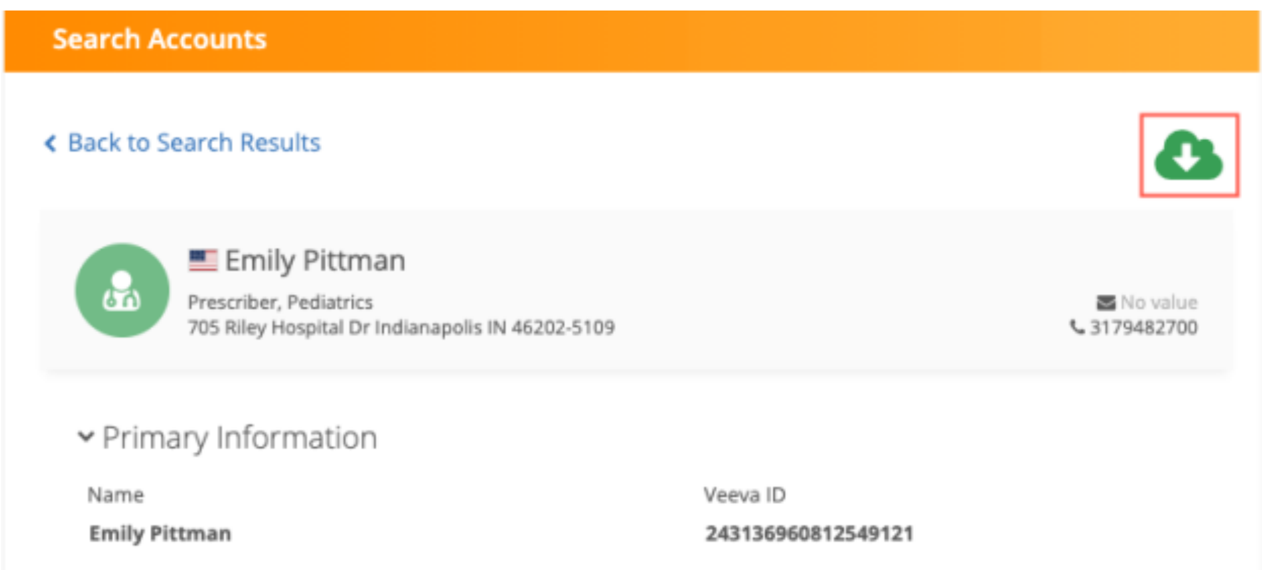
Select the **Display OpenData Download Button** so users can understand which records are not in their Network instance and download those records from Veeva OpenData. By default, the setting is not selected. When the setting is enabled, the **Download** button displays in the search results and on the record profile.

This can be useful when users want to copy records to another system; they will need to first download it to Network.

Search results



Record profile

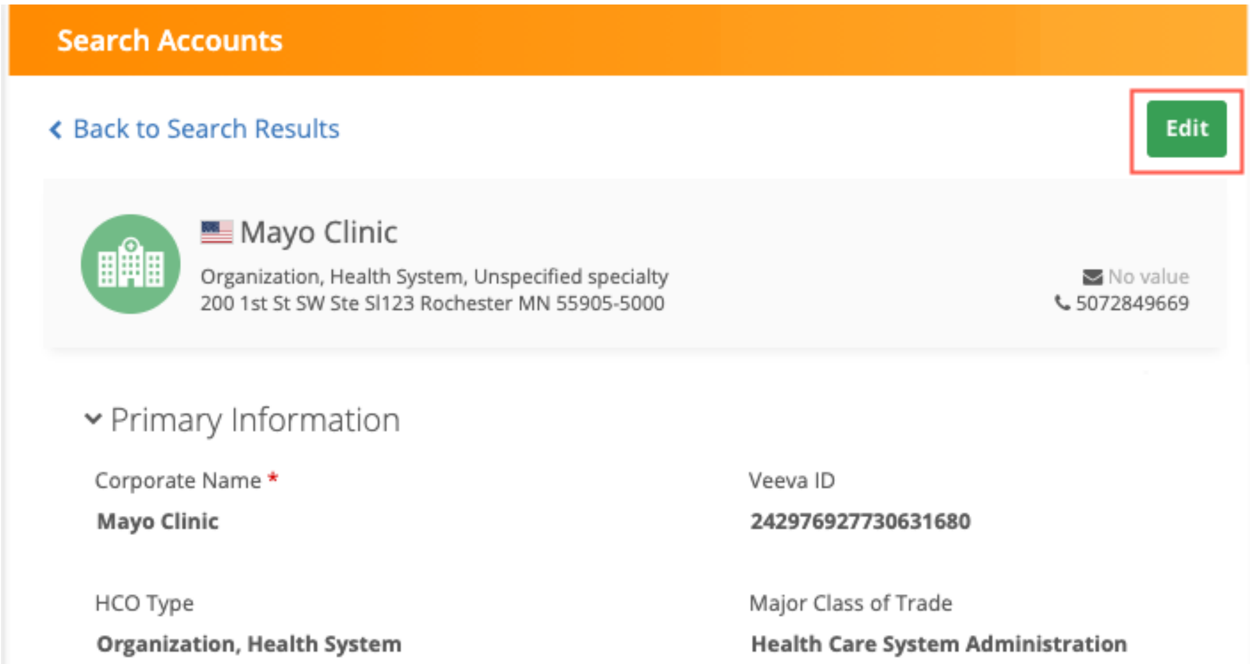


Note: If you do not have permission to download records from OpenData through your data visibility profile, the **Download** button does not display.

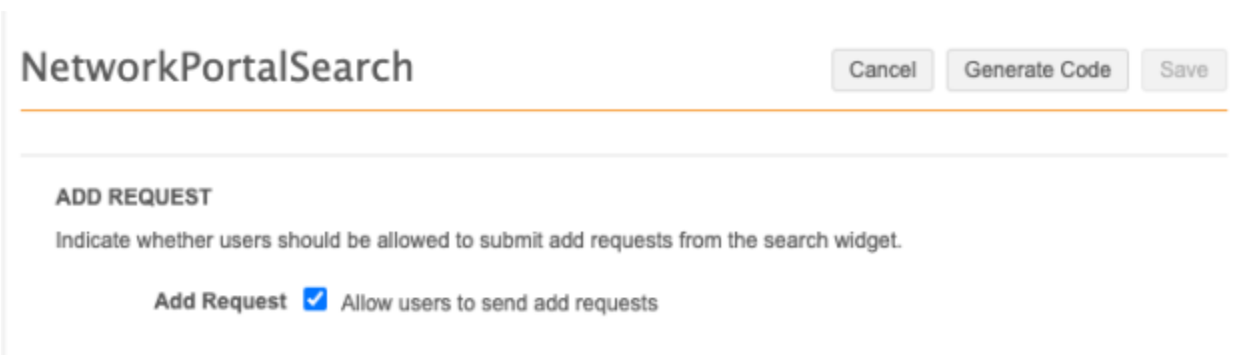
Edit settings

To prevent users from making changes to data in the Network Portal, select the **Hide Edit Button** setting. This is supported for the Search widget in Network Portal applications only.

The **Edit** button displays on profiles for records that are in your Network instance. It does not display on records that have not yet been downloaded from Veeva OpenData.



Tip: To make the Search widget in the Network Portal completely read-only, do not select the **Add Request** setting in the Search widget configuration (**Widgets & Portal > Network Widgets**). This prevents users from submitting add requests through the Search widget.

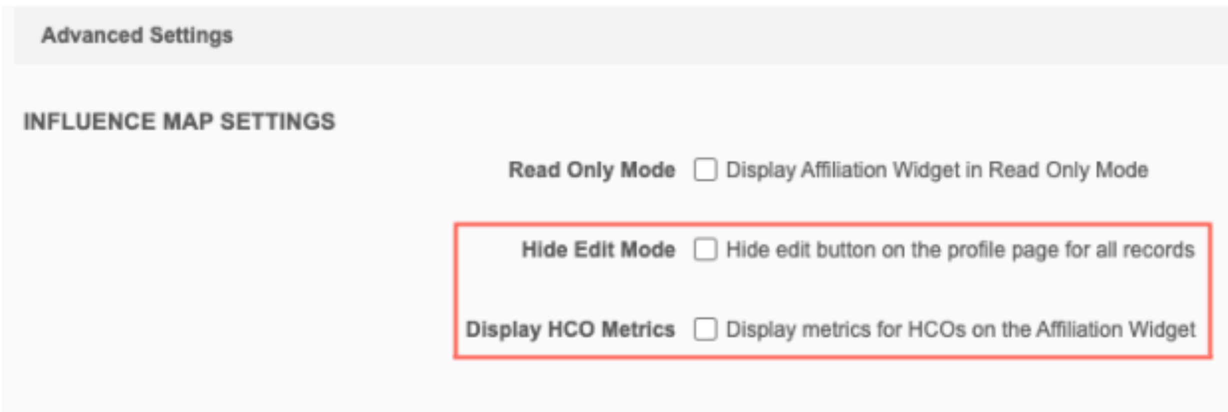


ADVANCED SETTINGS - AFFILIATION WIDGET

The **Advanced Settings** section for Affiliation widgets in Network Portal applications is updated to include specific settings to restrict editing and to display HCO metrics.

New advanced settings

- **Hide Edit Mode** - To prevent users from making changes to data, do not display the **Edit** button on the profile page.
- **Display HCO Metrics** - Display metrics for HCOs. The existing metrics that are used for HCPs can be applied to HCOs.



Enable the settings

In the Admin console, click **Widgets & Portal > Network Portal**.

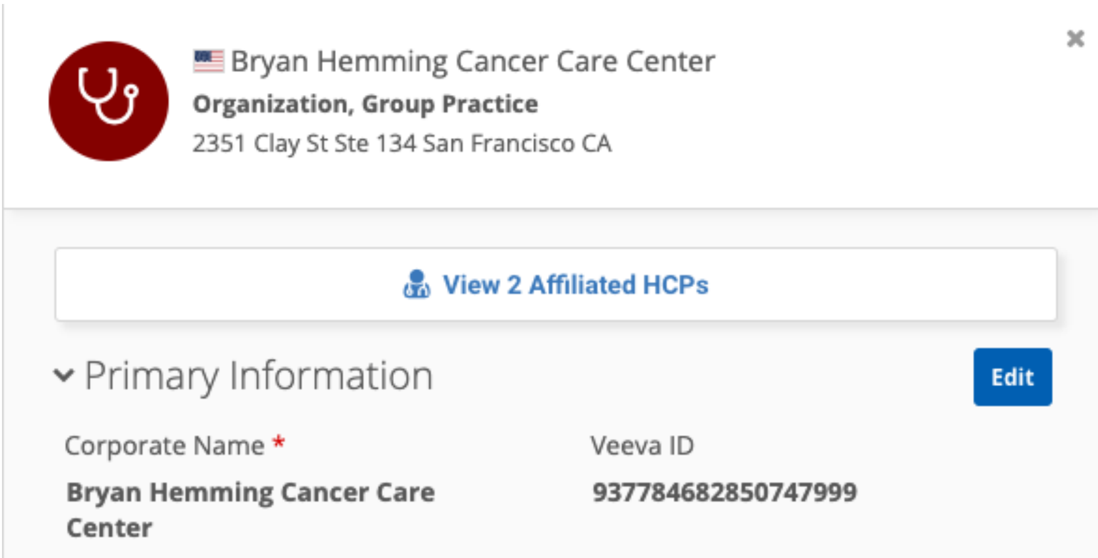
1. On the Network Portal page, open an application that contains an Affiliation widget.

   In the **Widget Configuration** section, the defined Affiliation widget contains the **Advanced Settings**.

2. Select the settings that you want to add to customize your application.
3. **Save** your changes.

Hide edit mode

When the **Hide Edit Mode** setting is enabled, the **Edit** button is removed from record profiles that display in the Influence Map. This prevents users from making changes to data.

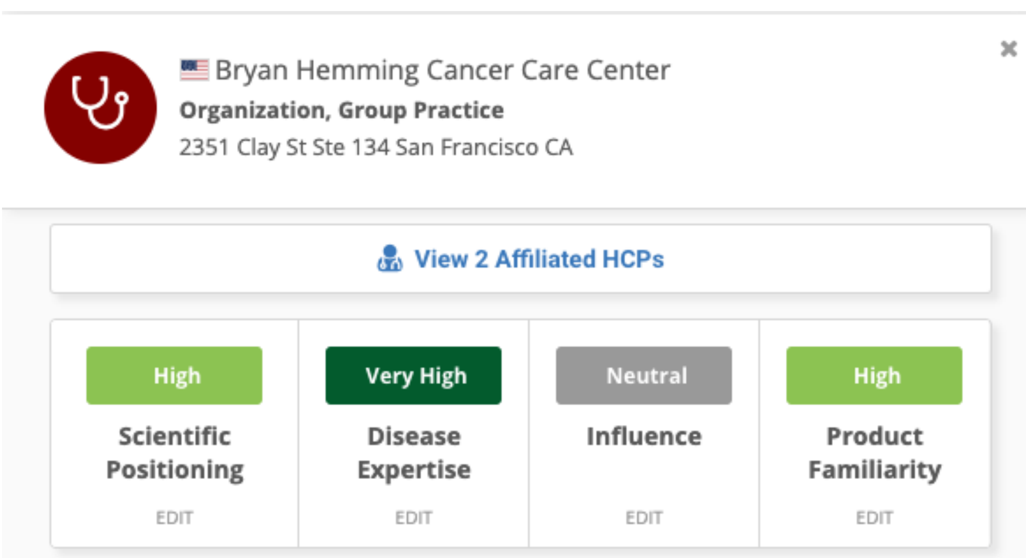


Display HCO Metrics

Enable this setting to add metrics to HCO records on your Influence Map. The existing metrics that you defined for HCPs in your Affiliation widget configuration can be applied to HCOs.

To view metrics on the Influence Map, use the **Filter by Rating** section in the **Tools** menu.

Note: If you have custom branding applied, the HCO icon colors do not update with the filtered metric. Open the HCO profile to view the individual ratings.



Network widgets - General updates

Network widgets profile layouts

The primary country field is added to the predefined **NetworkWidgetsLayoutHCO** and **NetworkWidgetsLayoutHCP** profile layouts. The field is added to the **Primary** section of the layout. Adding this field ensures that there is a country associated with data change requests that are submitted through the widgets.

This enhancement is added by default in new Network instances and in existing Network instances.

Affiliation widget

Several enhancements have been made to the Influence Map to help you view and manage the accounts and views.

Bulk editing

You can now select multiple HCP and HCO accounts to manage at the same time. Influence maps can contain hundreds of accounts. Previously, each account had to be moved, removed, or added to views individually. Now, you can select multiple accounts to quickly manage; for example, you can copy multiple accounts from one view to another custom view.

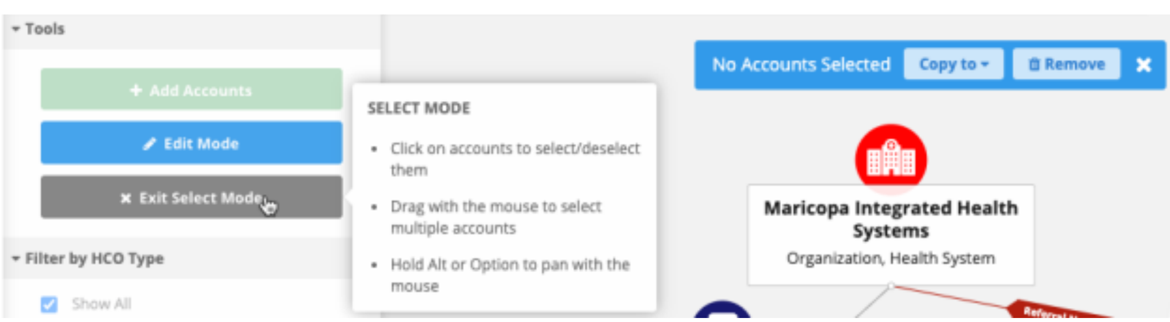
This enhancement is enabled by default in the Affiliation widget.

Select multiple accounts

To select accounts in bulk:

1. On the **Tools** menu, click **Select Multiple**. Your mouse cursor will become a crosshair **+** symbol and an action bar will display at the top of the map.

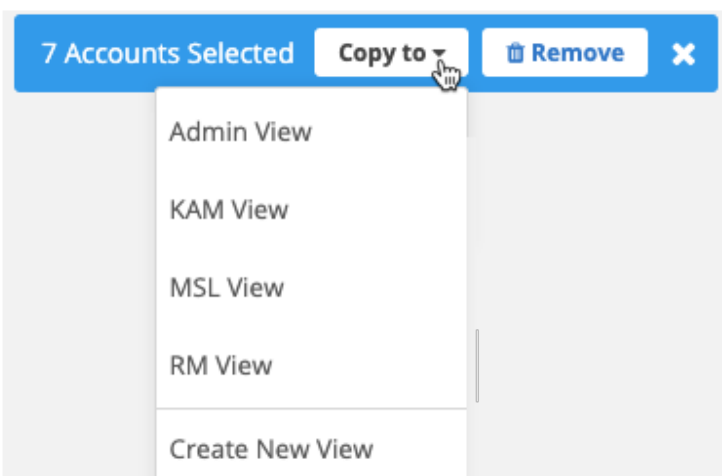
   A tooltip displays when you hover over **Select Multiple** to explain how to select and deselect accounts and how to pan the view. The other actions on the **Tools** menu are dimmed and cannot be used when **Select Mode** is activated. You can choose **Edit Mode** but that will deactivate **Select Mode**.



2. Click the map and drag a rectangle to select multiple accounts. The accounts become highlighted. While the accounts are highlighted, you can click other accounts to add them to the selection.

To deselect one account when multiple accounts are highlighted, click the account. To deselect all accounts, click an empty area on the view.

3. At the top of the map, the action bar updates to display a count of the selected accounts. For example, **7 Accounts Selected**. The count updates if you select more accounts or remove a selected account.



The following actions are available for the selected accounts:

- **Copy to** - Expand the list to copy the accounts to another view. Copy to an existing view or create a new view. The existing views that are available for this product and therapeutic area are listed.

Note: Relationships are also copied to new or existing views if both accounts are copied; the connecting line between the accounts is maintained.

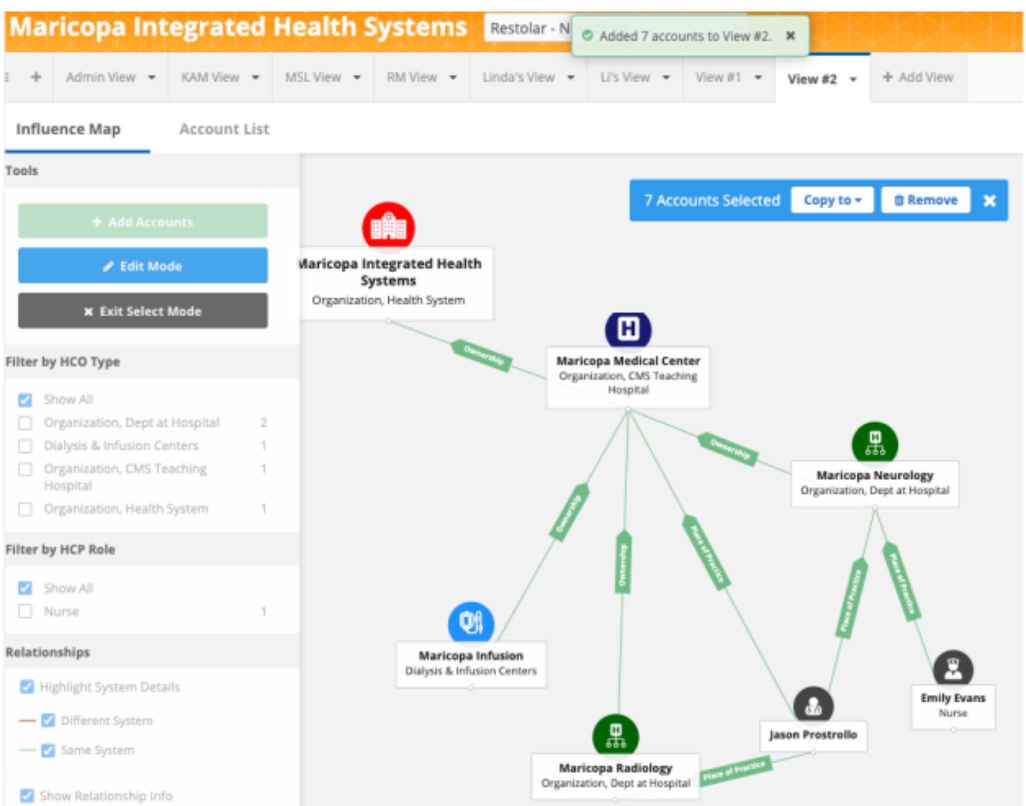
Copy the accounts to an existing view

Choose one of the views in the list. The accounts will be copied and the view will open with the selected accounts highlighted. The accounts are added to the bottom of the view but will maintain their relative position; you can reposition them while they are still highlighted.

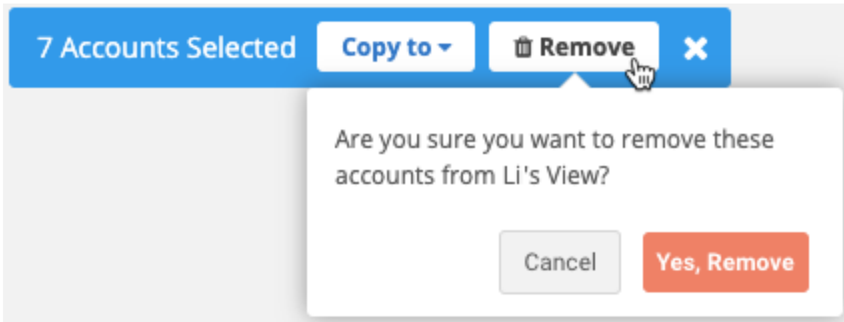
If an account already exists in the view, it will not be copied; the existing account position is maintained.

Create a new view

Click **Create New View**. A new view will be added and it will open with the selected accounts copied and highlighted. The health system is not automatically added to the new view. The view will be given a default name; for example, View #1.



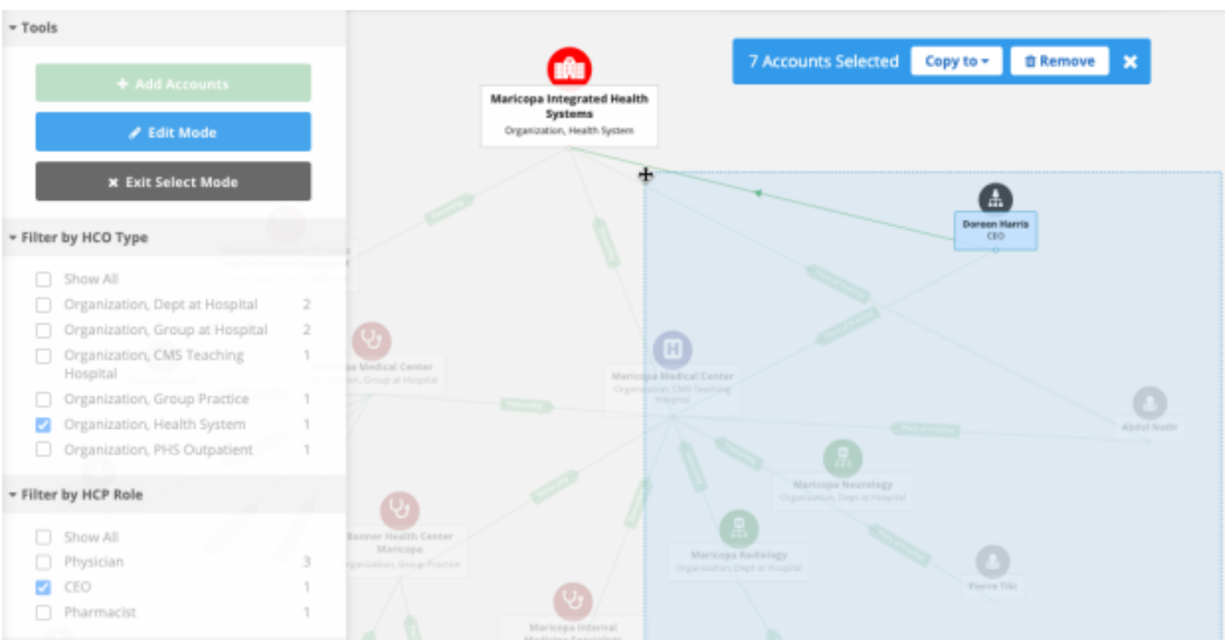
- **Remove** - Delete the accounts from the view. In the confirmation pop-up, click **Yes, Remove**. The accounts are deleted from the view.



4. You can also select multiple accounts to reposition them on the existing view. To reposition the accounts, hover over a highlighted account and your mouse cursor will become a hand. Click and drag the accounts to another place on the view.
5. When you are finished, click **Exit Select Mode** to activate the other options on the **Tools** menu again.

Filtered view

If the view is filtered to highlight specific HCPs or HCOs, only those accounts are available for selection. When you draw the area to select accounts, the dimmed accounts are not included. This is helpful for copying or removing specific accounts.



DISPLAY RELATIONSHIP INFO

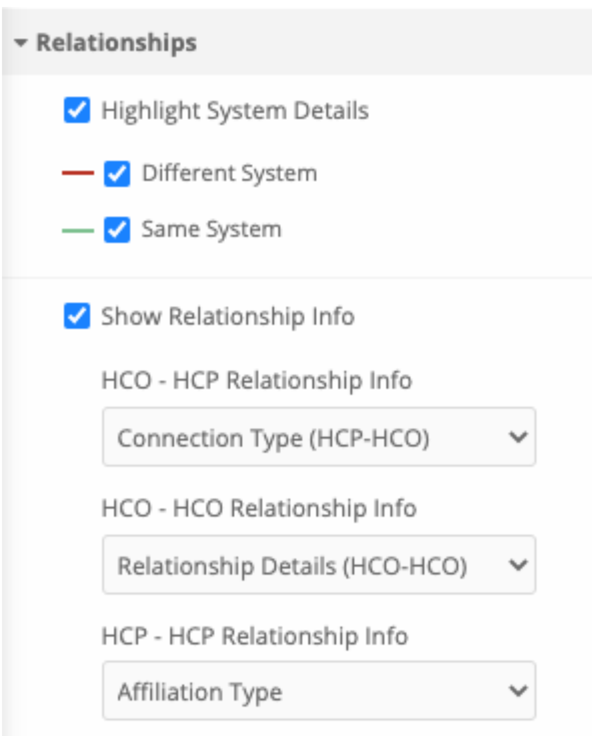
You can now choose how to display relationship information on the Influence Map. Relationships labels can be useful for understanding how objects are related, but for some users, the connecting lines are sufficient. Using the **Tools** menu, you can decide how the information is presented.

This enhancement is enabled by default for your Affiliation widget.

Viewing relationship labels

The **Tools** menu includes a **Relationships** section. The **Show Relationship Info** setting is enabled by default.

Note: If all relationships (HCP-HCO, HCP-HCP, HCO-HCO) have just one label each, only the **Show Relationship Info** option displays.



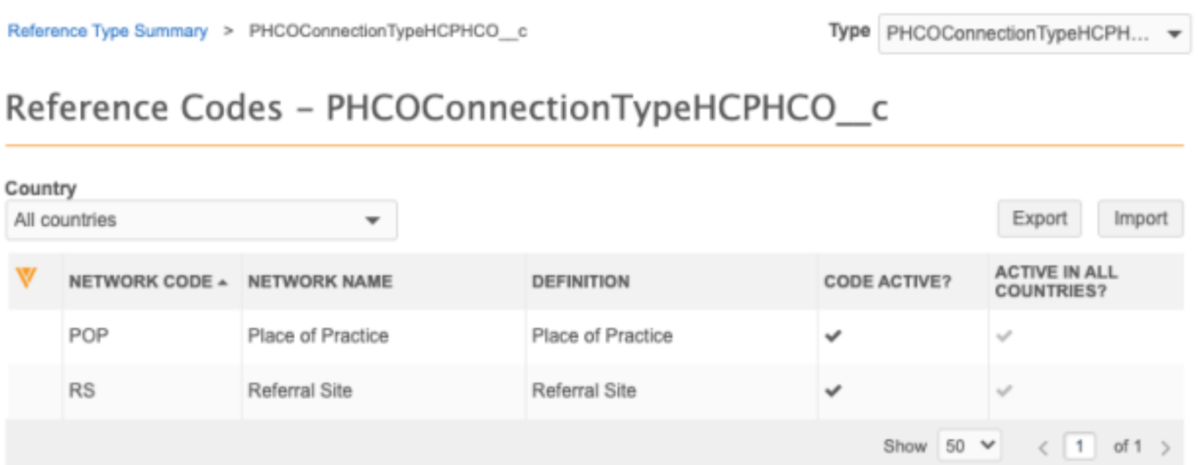
For each relationship, you can define how you want to see the relationships identified on the Influence Map.

Example - HCO-HCP relationships

Expand the **HCO-HCP Relationship Info** list, to choose one of these options:

- **No label** - Display only the connecting line between related objects only.
- **Arrow Only** - Display an arrow on the connecting line to identify the direction of the relationship.
- **Connection Type** - Display a label that describes the type of relationship between the HCO-HCP.

  This option is mapped to the custom field that you have defined for the Parent HCO object for these relationships. To add custom fields for relationship labels, contact Veeva Support.


Reference Type Summary > PHCOConnectionTypeHCPHCO__c
Type PHCOConnectionTypeHCPH...

Reference Codes – PHCOConnectionTypeHCPHCO__c

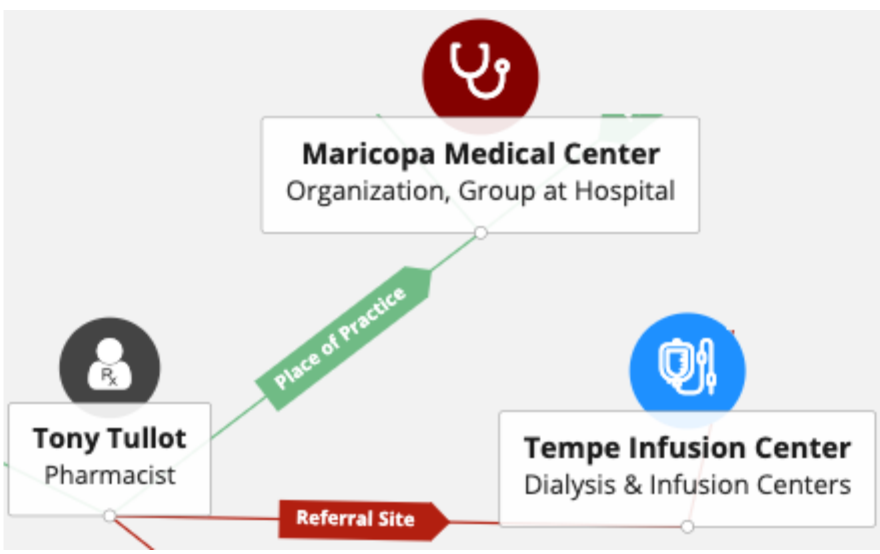
Country
All countries

Export Import

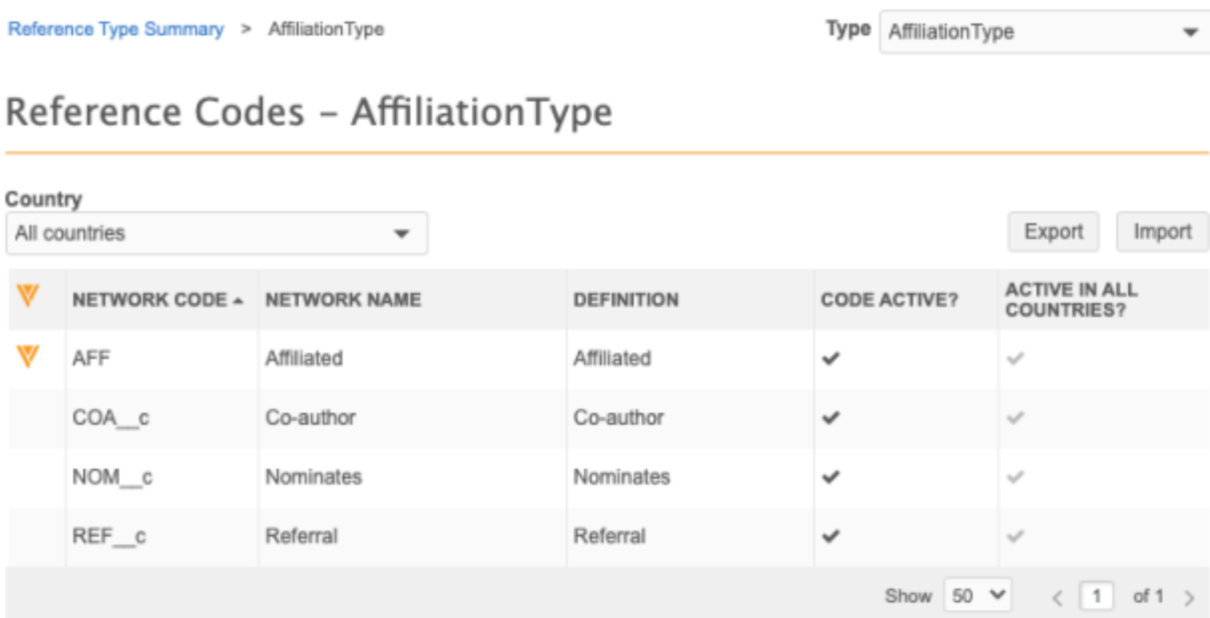
NETWORK CODE	NETWORK NAME	DEFINITION	CODE ACTIVE?	ACTIVE IN ALL COUNTRIES?
POP	Place of Practice	Place of Practice	✔	✔
RS	Referral Site	Referral Site	✔	✔

Show 50 1 of 1

When **Connection Type** is selected, the relationship label displays the reference value.



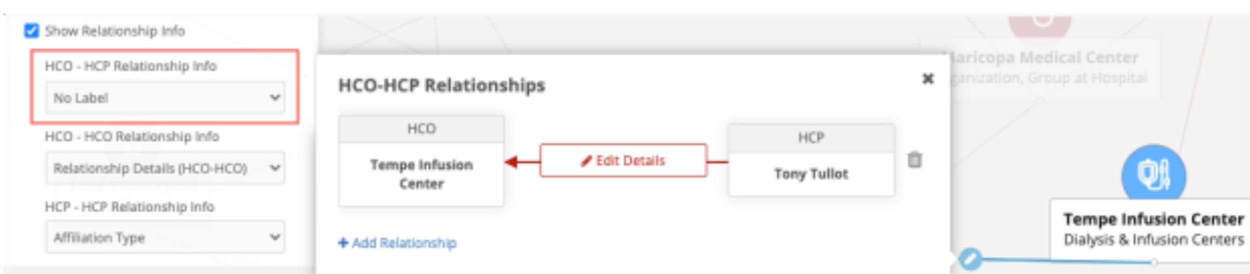
Similarly, the HCO-HCO relationship will have these options with the custom field that is created for those relationships. The **HCP-HCP Relationship Info** list always contains the Affiliation Type field. When you edit the relationship details on the Influence Map, you can update the label with the type of affiliation based on the reference values for the field.



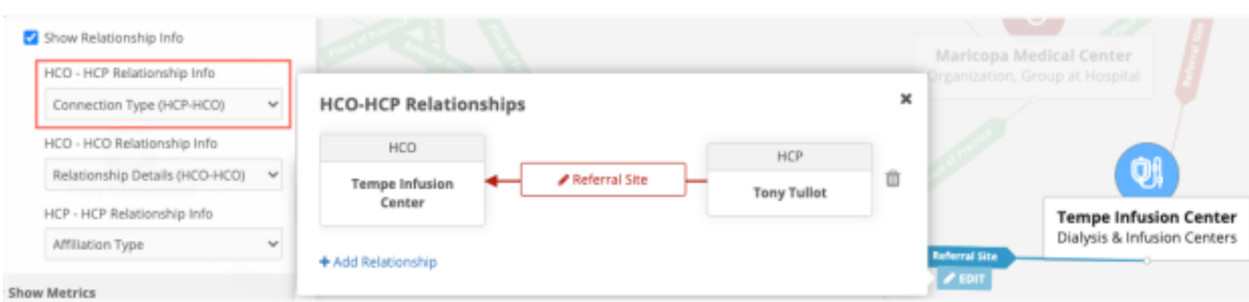
NETWORK CODE	NETWORK NAME	DEFINITION	CODE ACTIVE?	ACTIVE IN ALL COUNTRIES?
AFF	Affiliated	Affiliated	✔	✔
COA__c	Co-author	Co-author	✔	✔
NOM__c	Nominates	Nominates	✔	✔
REF__c	Referral	Referral	✔	✔

Editing relationships

When you edit a relationship (click on the connecting line between the two objects), the pop-up displays the relationship label. If you have chosen **No Label** or **Arrow Only** for the relationship info in the **Tools** menu, the **Edit Details** label displays between the two objects.



If you chose to display the label, the pop-up displays the current label for the relationship.



Reposition relationship labels

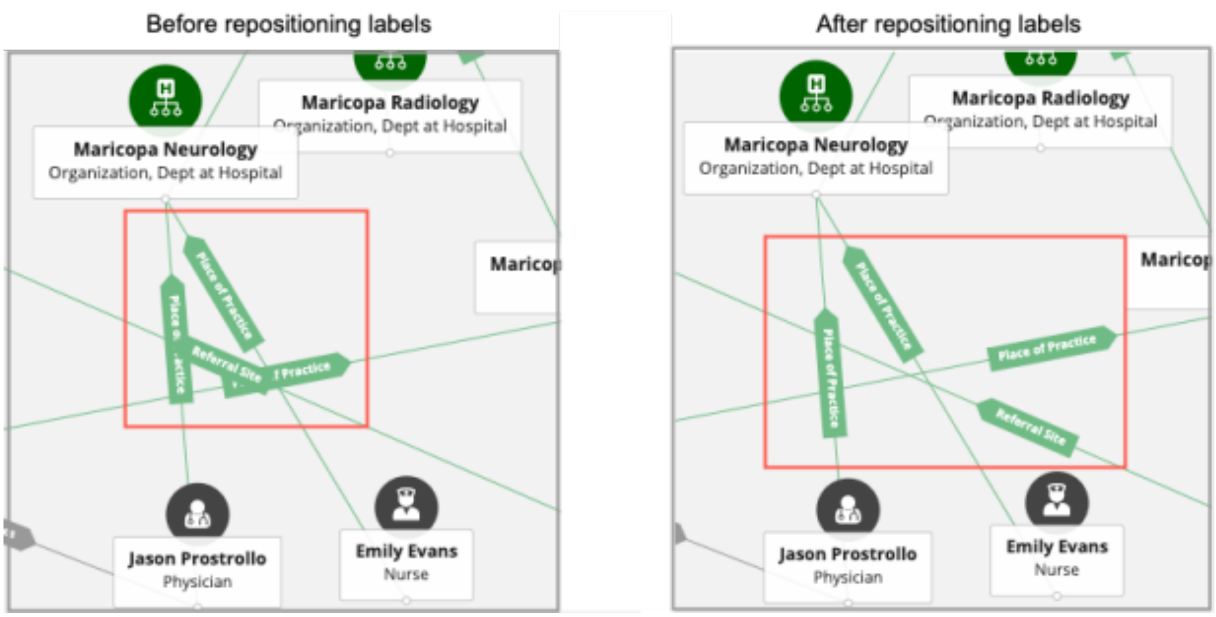
Users can now move the relationship labels on the connecting lines between two entities. This is helpful to avoid overlapping when Influence Maps are large.

This enhancement is available by default.

Move a label

To help you to clearly read relationship labels, you can reposition it on the connecting line. For example, if you have labels that are overlapping or very close, you can move them to improve readability.

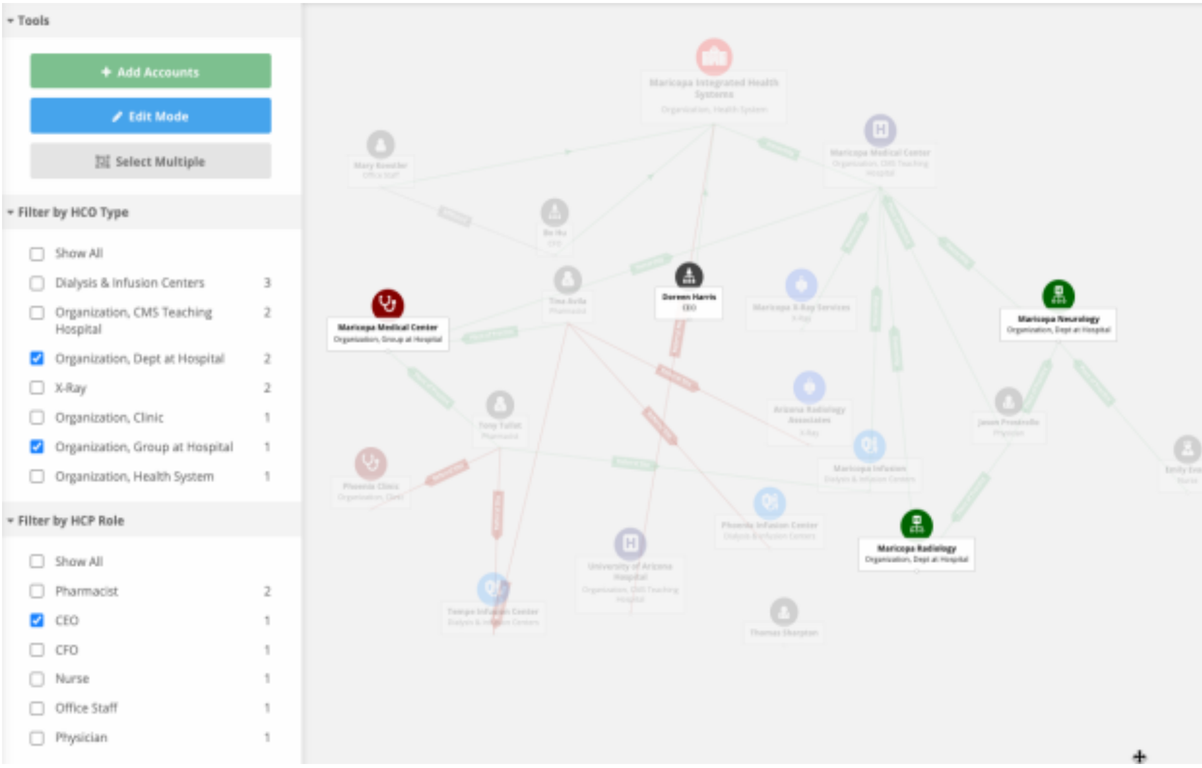
To move the label, hover your cursor over the label and drag it to a different position.



Filter by HCP/HCO

You can now use filters to highlight specific HCPs and HCOs on the Influence Map. When the filters are selected, records and relationships that are filtered out are dimmed so you can easily see which accounts apply to your selections.

You can also use the **Filter** section in the **Tools** menu as a quick overview of your health system. For example, you can easily see the number of Clinics or Infusion Centers in the health system.

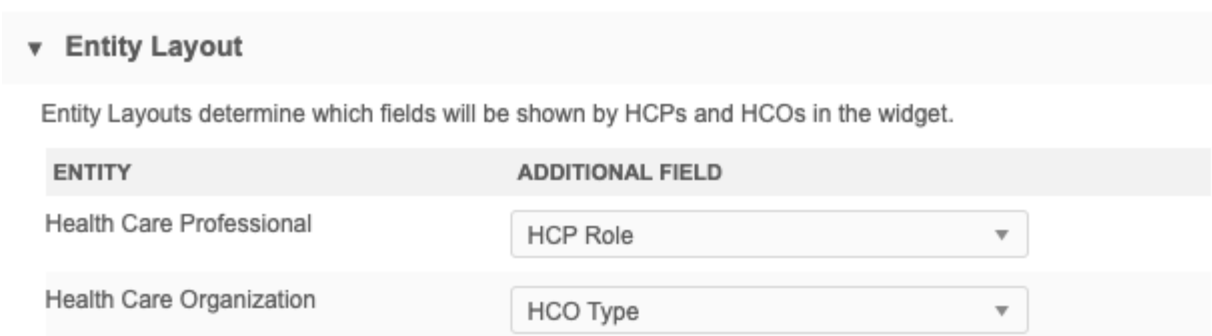


The ability to filter is enabled by default in your Affiliation widget Influence Map.

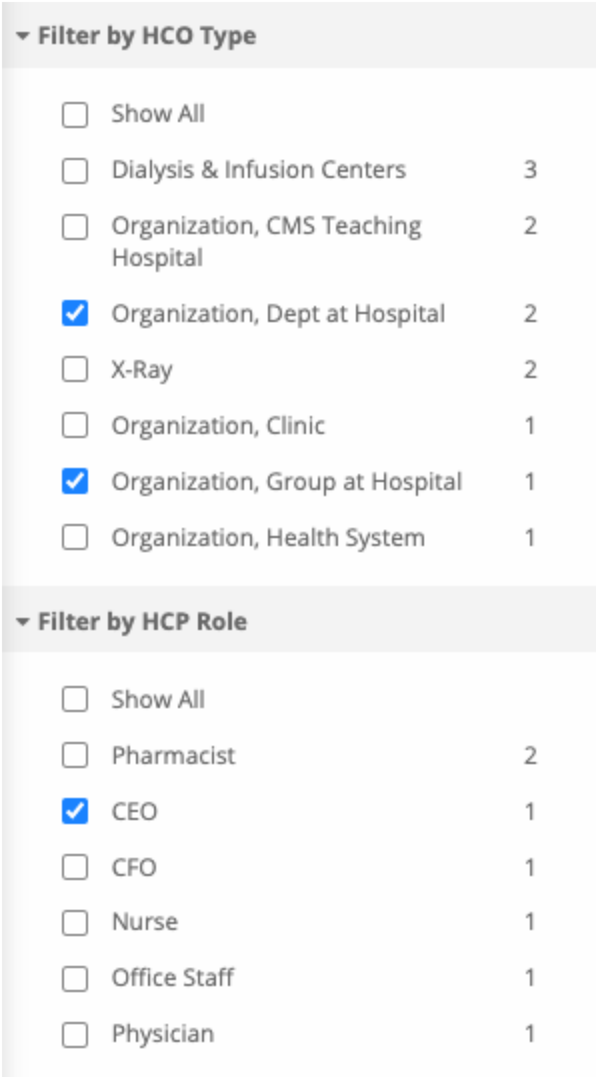
Filter types

Filters are based on the customized branding field used for the entity icon and color. If custom branding has not been defined for the entity, then the entity layout field that you defined in the Affiliation widget configuration is used.

In this example, the Entity Layout field for HCPs is **Role**, so HCP filtering is based on role. Similarly, HCOs are labeled by **Type**, so HCO filtering is based on type.



These fields map to the HCO/HCP filtering options available in the Influence Map.



The reference values for the field display based on the health system's country. For example, if the health system is in the United States, only US reference values display. A count beside each reference value represents the number of HCPs and HCOs labeled with that value on the Influence Map.

The reference value list is sorted by count and then alphabetically. If there are more than 10 values in the list, click **Show More** to view additional values.

Note: If the entity layout field is a text field, the filter sections do not display in the **Tools** menu.

Custom branding

If custom branding fields have been applied, they are used instead of the entity layout fields.

EDITING PROFILES

An **Edit** button is now available on profile previews so you can immediately update a record. This is particularly useful for updating the entity labels that display on Influence Map to support HCP and HCO filtering. For example, if you download a record from Veeva OpenData and the field that you use for the entity label (for example, HCP Role or HCO Type) does not have a value, you can immediately add a value so that record can be included in filtering.

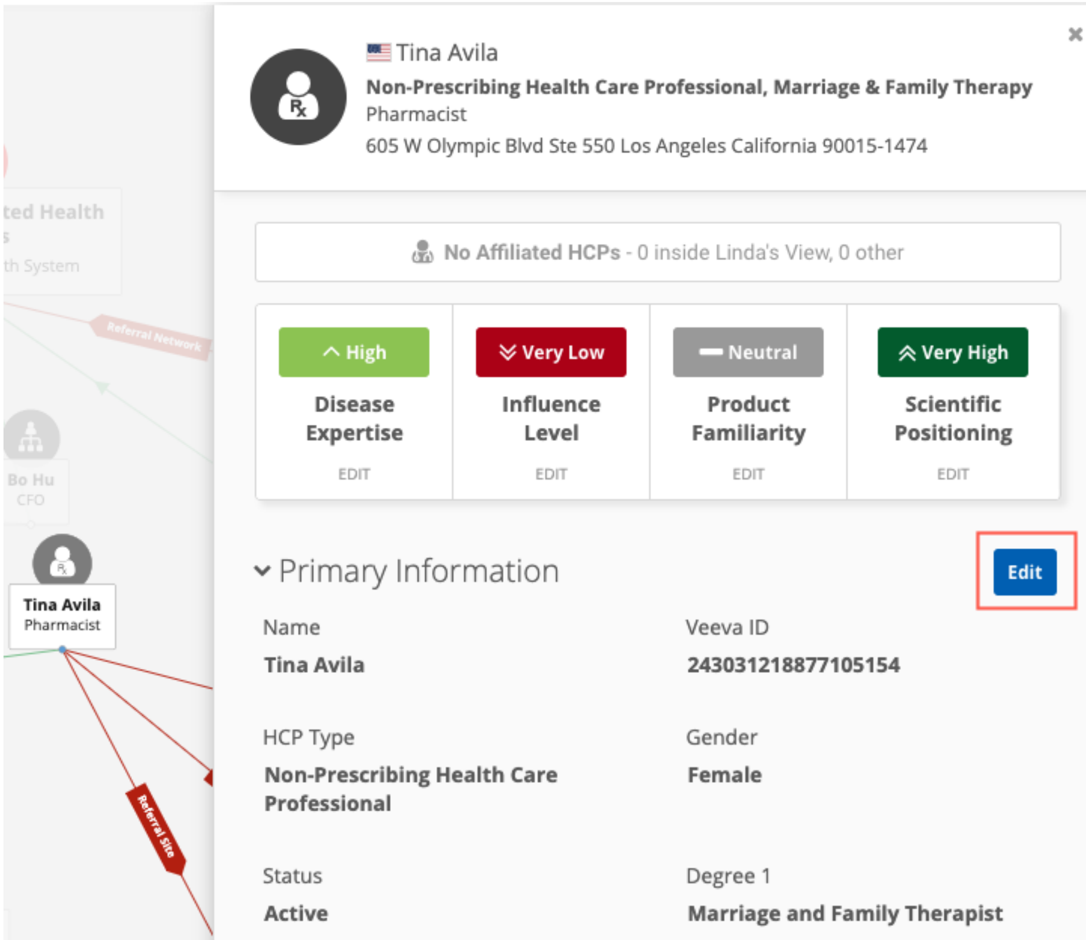
This enhancement is enabled by default.

Edit a profile

Click an account on the Influence Map or the Account List to view a profile preview. The **Edit** button is available below the metric details. The button does not display if the Affiliation widget is in read-only mode.

To edit the record:

1. Select the account on the Influence Map to open the profile. Click **Edit**.
2. Add or update the field values on the record. If you have restricted access to a field, the field cannot be edited.
3. Click **Save**.
4. In the **Confirm Changes** dialog, optionally type a note to provide details to the Data Stewards that will process the change request.
5. Click **Submit** to route the changes to be processed. If the field is automatically approved, the Influence Map is immediately updated.



Hide the Edit button

If the Affiliation widget is embedded in the Network Portal and you do not want users to make changes to record data, you can hide the **Edit** button. Use the **Advanced settings** in the Network Portal application.

If the Affiliation widget is embedded in an internal application, Web developers can add a property to the generated widget code to hide the **Edit** button.

Property

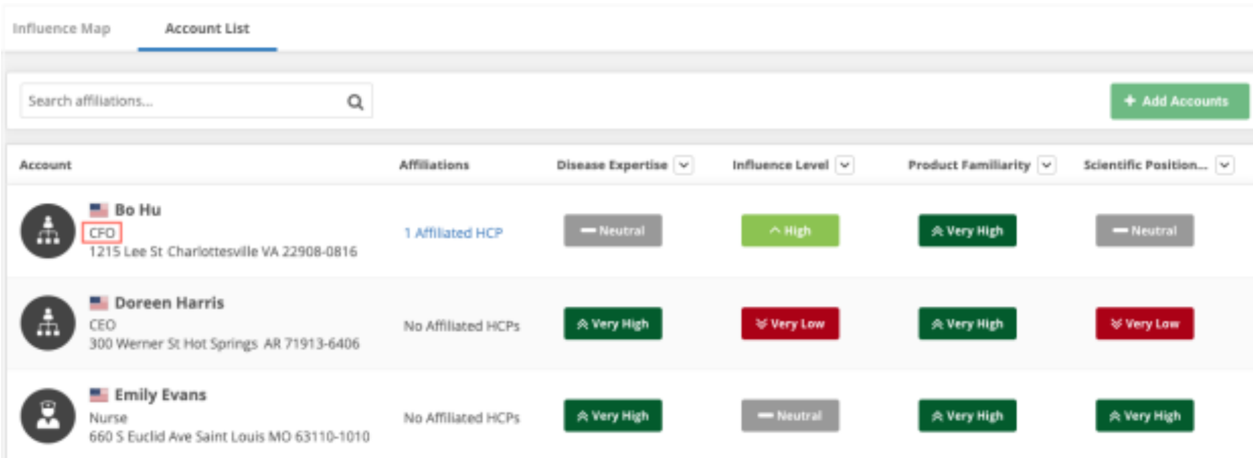
```
hide-edit-profile-button="true"
```

Example code

```
<veeva-network-affiliation-widget
     widget-name="AffWidget"
     auth-domain="my.veevanetwork.com"
     widget-id="MTAwMDI7OztzZXJ2aWNlY2xvdWRhX19j"
     hide-edit-profile-button="true">
 </veeva-network-affiliation-widget>
```

ACCOUNT LIST

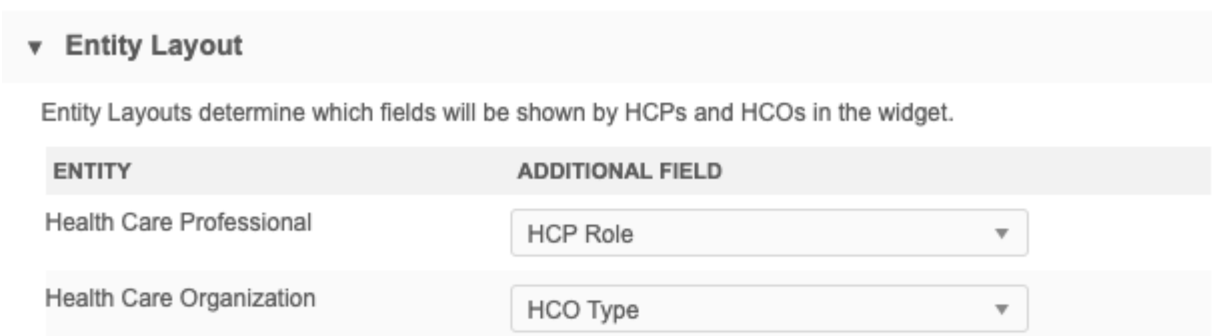
The entity layout field now displays on records in the Account List to help you identify HCPs. Previously, the field displayed on the accounts in the Influence Map only.



This enhancement is enabled by default for your Affiliation widget.

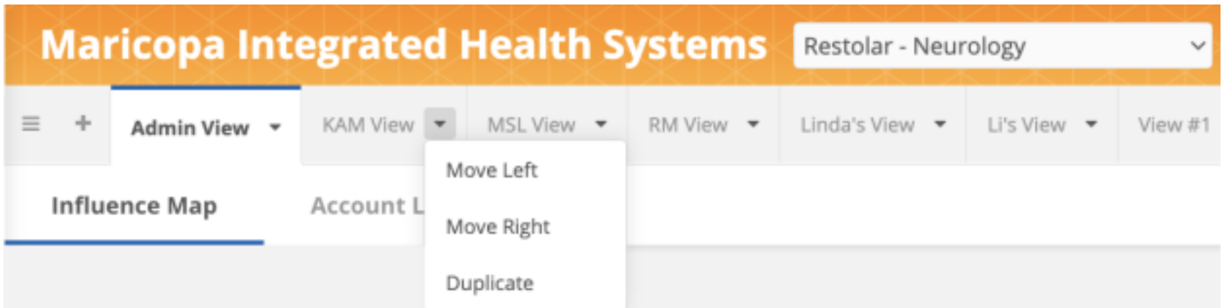
Entity layout field

This field is configured in your Affiliation widget configuration. It can be a custom field or a Veeva field. If the field is empty, no value display on the **Account List**; only the HCP's address will display.



REMOVING STANDARD VIEWS

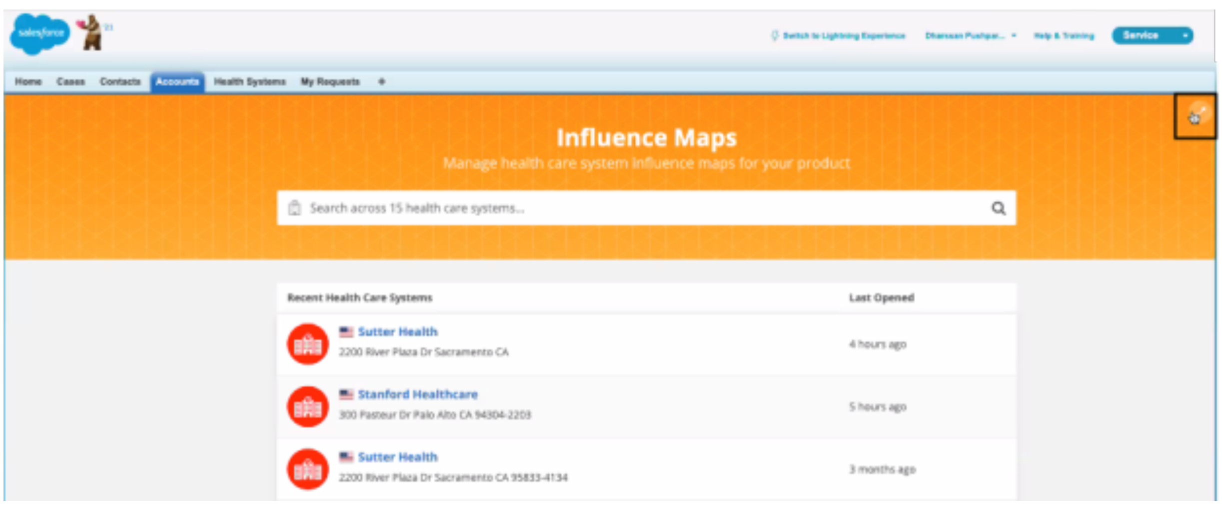
Standard views can no longer be deleted from the Influence Map. Previously, they could be removed by any widget user. Standard views are created by Veeva Support upon request, so the **Delete View** option has been removed to prevent the views from being inadvertently deleted.



This change is enabled by default in the Affiliation widget.

FULL SCREEN SUPPORT

The Affiliation widget can be viewed in full screen when it is embedded in Salesforce Classic™. Use the **Full screen** icon in the top right corner to expand the Affiliation widget.



This enhancement is not enabled by default.

Enable full screen mode

To support full screen mode, Web developers can add a new property to the generated Affiliation widget code that is embedded in your internal application.

Property

```
full-screen-mode="true"
```

Example code

Add the property to the end of the generated code.

```
<veeva-network-affiliation-widget
     widget-name="AffWidget"
     auth-domain="my.veevanetwork.com"
     widget-id="MTAwMDI7OztzZXJ2aWNlY2xvdWRhX19j"
     full-screen-mode="true">
 </veeva-network-affiliation-widget>
```

Search widget

SEARCH LOCAL RECORDS ONLY

A new property is now supported to restrict users to search results in your Network instance only; results from Veeva OpenData will not display. Using this setting returns a significantly fewer number of results and prevents users from seeing records that might not be relevant.

Property

```
search-local-only="true"
```

Web developers can add the property to the generated widget code in your internal application.

Example code

```
<veeva-network-search-widget
     widget-name="ServiceCloudA"
     auth-domain="my.veevanetwork.com"
     widget-id="MTAwMDI7OztzZXJ2aWNlY2xvdWRhX19j"
     search-local-only="true">
 </veeva-network-search-widget>
```

Data components

Users can now view external data related to HCPs, HCOs, and custom objects directly from the Network UI using data components. Administrators can create a component to query specific data from Salesforce orgs (for example, Veeva CRM and Salesforce Service Cloud™) so users can access Salesforce data from Network record profiles. Data stewards can also access the data from data change requests.

For example, to validate a primary address change, Data Stewards can access the latest call data from Salesforce to verify the recent addresses that have been visited for an HCP; this helps them to know if the change is valid.

This feature is enabled by default in your Network instance.

VIEWING EXTERNAL DATA USING DATA COMPONENTS

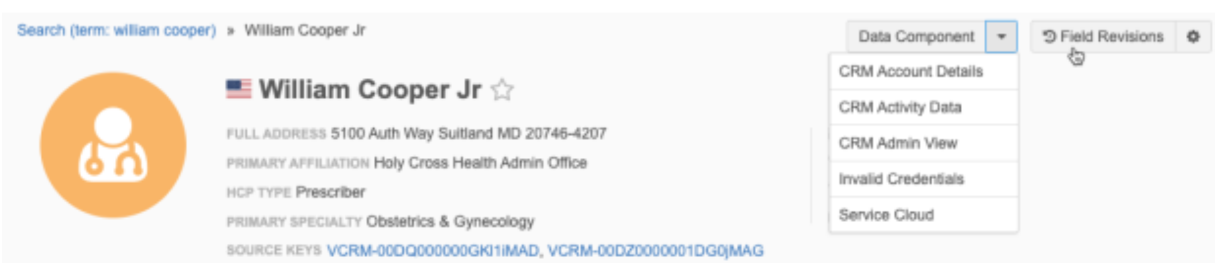
Administrators can create data components so users can access Salesforce data without logging into external applications like Veeva CRM and Service Cloud. Network users can click the **Data Component** button on record profiles or data change requests.

Data components can be restricted by user, entity, and country. If the button does not display, it might be unavailable to you through your assigned user group, or it might be unavailable for the entity type or the primary country of the record.

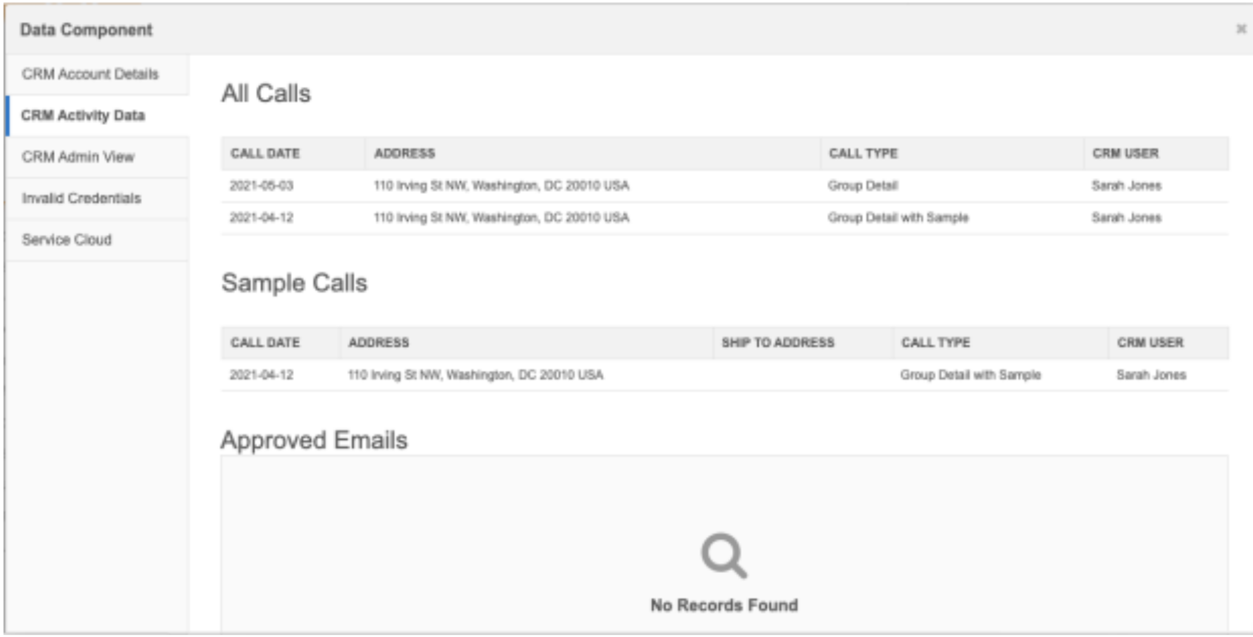
Profile page

The Data Component button displays on record profiles. Expand the list to see all the components available for the record. Each component is connected to a different Salesforce org and may contain different types of data. Network administrators create each component and customize the data that is available to view.

The components are listed alphabetically.



When you select the **Data Component** button, the first available data component will be opened. When you select a specific component from the list, the **Data Component** dialog opens to that component. There might be several sections for a component. Each section contains specific data. For example, there could be a section for Addresses, Account Information, and Call Details.



When there is no data available, the **No Records Found** message displays in the section.

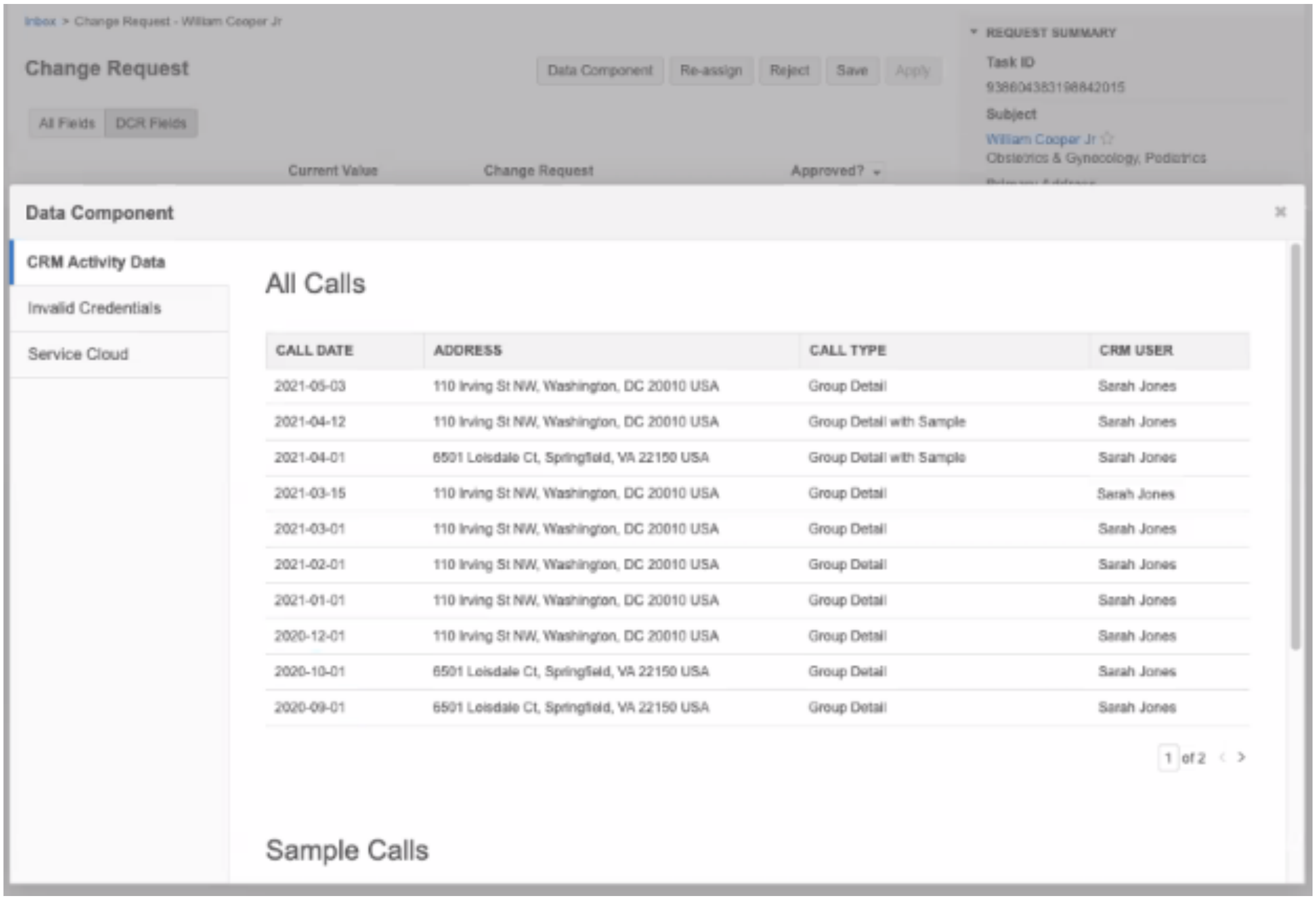
Data change requests

Data Stewards and Data Managers can view data components on add requests and change requests. When you click the **Data Component** button from a DCR, it opens to the first component that is listed alphabetically.

Note: On add requests, if the Create Unverified feature is not used on the DCR, the **Data Component** button does not display because the record does not yet have a Veeva ID.

Example

A change request is submitted by a sales rep, Sarah Jones, to change the primary address for an HCP. When she submitted the request, Sarah added a comment that she's been visiting the HCP at a new address recently. To validate this change, the data steward can open the data component to see the latest call data on the HCP's CRM account.



CREATE A DATA COMPONENT

Administrators can create data components.

1. In the Admin console, click **Widgets & Portal > Data Components**.
2. Click **Add Data Component**.
3. In the **Details** section, define the following:
   a. **Name** - The unique name that will be used for the component on the profile and data change requests.
   b. **System** - The Network source system.
   c. **Type** - This is read-only. Salesforce is the default type.
   d. **Description** - A meaningful description that is used on the Data Components list page only.
   e. **Status** - The data component is **Enabled** by default.
   f. **External Credentials** - Expand the list and select the Salesforce org that you want to connect to retrieve the data.

      If the Salesforce org isn't listed, click **Create a New External Credential** to define new credentials for a Salesforce org.

      Click **Test Connection** to ensure that you can connect to the Salesforce org.

4. In the **Permissions** section, specify the records that the data component will display on and the users that will have access to it.

    a. **Countries** - By default, **All Countries** is selected. These are all the countries that you have set up in your Network instance. Choose **Selected Countries** to limit the component to specific countries. For example, you might want this component to apply only to specific countries in Europe.

    Expand the list to select the countries. Only the countries that are defined in your Network instance display in the list.

    b. **Entities** - By default, **HCP** is defined. Click the field to add entities. Veeva standard objects and custom objects are supported.

    c. **User Groups** - Define the users that can access the data component. By default, **All Users Except Integration Users** system managed user group is selected. Choose **Specific User Groups** enable the option to define different groups.

    Click **Add user groups to data component** to choose existing user groups. Click **Create a new group here** to define a new user group to use for this data component.

5. In the **Component Builder** section, use a SOQL query to retrieve specific data from Salesforce. Write your own query or click **Sample Queries** to use a predefined query.

    Each query that you define in the **Component Builder** is contained in a **Section**. When users view data components, the data displays under the section name that you define.

    Example section

    Use the **Addresses** sample query so Data Stewards can see address data from Salesforce to help them validate primary address changes in DCRs.

To define a query:

a. In the section, write a query or click **Sample Queries** to use a predefined query.

   If you click **Sample Queries**:

   - In the **Sample Queries** dialog, select a query; for example, the **Address** query so users can view address details for an account.
   - Click **Preview Query** to see the fields that are used for the query.
   - Click **Insert Selected Query** to add it to your section. The query is inserted into the section query box.

   About queries

   Data component queries use fields from the Veeva CRM object. Some sample queries might have a placeholder for a field enclosed in angle brackets (<>). If the query contains these placeholders, replace it with the appropriate field that you use in CRM. For example, replace <address_vid> with network_external_id__c.

   The Network field vid__v is included in the queries as a dynamic variable. The data component uses this variable to know which data to display when a user clicks the **Data Component** button on a record profile or data change request. Dynamic variables are in the format ':<field_name>'. Typically, the dynamic variable will be the Veeva ID field, vid__v, but it can be any field depending on the type of data you are querying.

b. In the **Section Name** field, type a name for this data; for example, Addresses. This name will be the header in the **Data Components** dialog that displays the data for users.

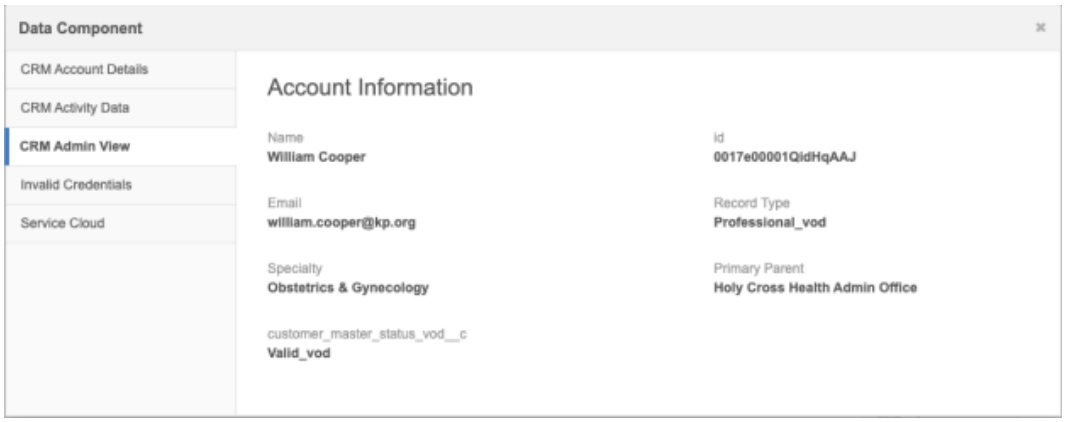
c. Choose the **View Type**. This is the format the data will be presented in the **Data Components** dialog that users view.

There are two view types:

- **Details View** - Use to display a single result; for example, account details.

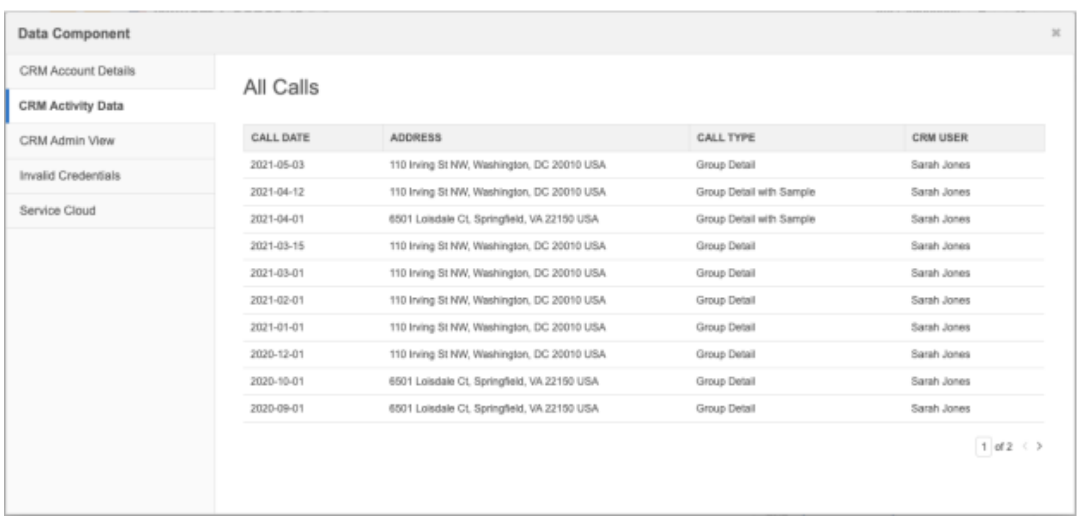
  If you use Detail view and the query returns more than one result, only the first result will display.

  Example Details view



- **Table View** - Use when you expect to return multiple results for an account. For example, address data or call data for an HCP.

  Example Table view



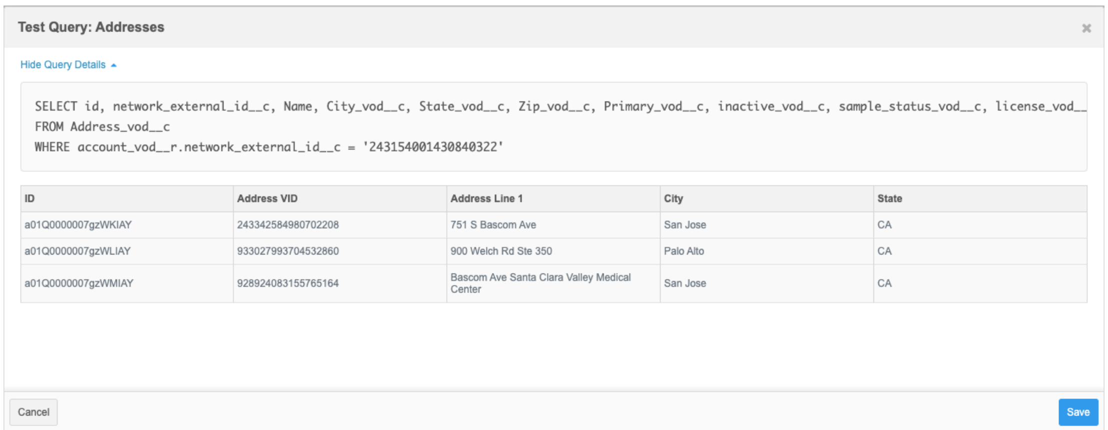
d. The **Headers** field contains a comma-separated list of the field names for the data. When you use a sample query, the headers are automatically populated but they can be changed.

   If no headers are defined, the column name is returned from the SOQL query.

e. Click **Test Query** to preview the results to ensure that this is the data you want to retrieve from Salesforce. Testing the query requires a record to retrieve the data. In the dialog, type a Veeva ID from a main entity (for example, HCP or HCO) so you can see the results. The **Test Query** dialog displays the query and the results.

Note: Your user permissions are used to test the query; not the country and user group permissions defined in the component. For example, if you submit a Veeva ID for a record in Spain but your data visibility profile permissions only include France and Germany, a permission error displays.

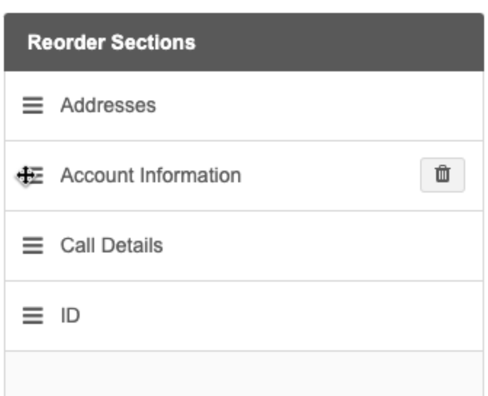
You can edit the headers that display. Editing and saving the headers in the **Test Query** dialog updates the **Headers** field in the section.



Notice that the Network field that was the variable; for example, `vid__v`, is replaced with the Veeva ID that you specified in the **Query Details** section.

Close the dialog to continue.

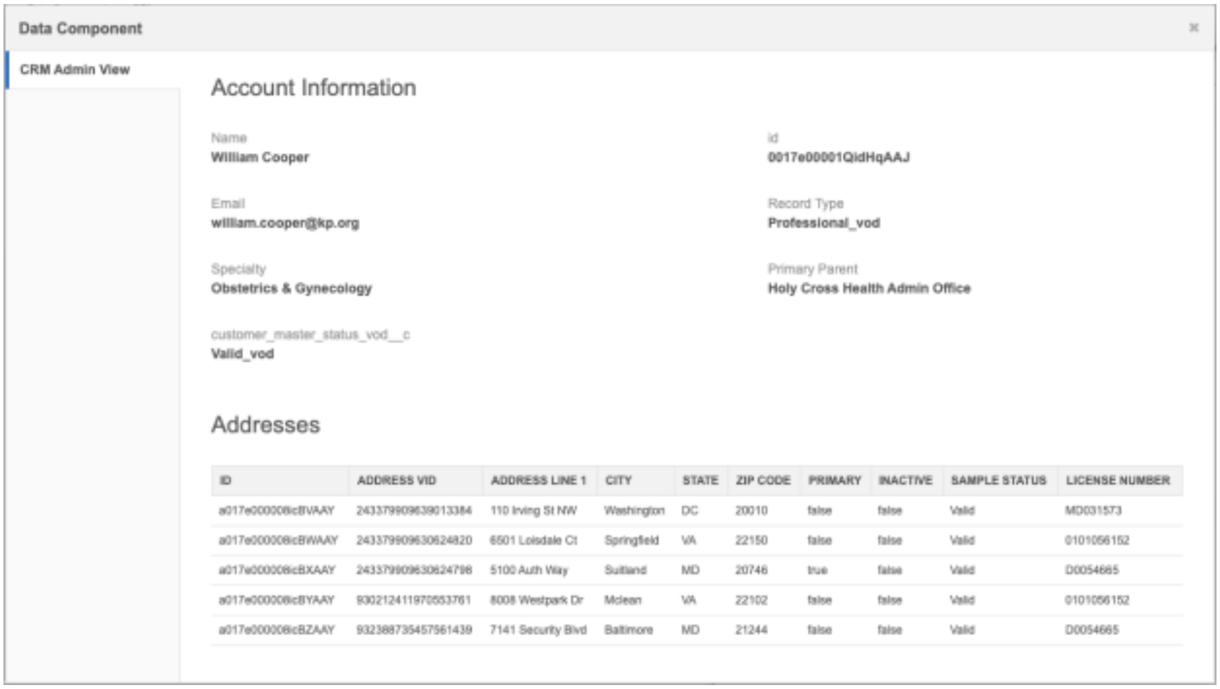
6. To add more sections, click **Add Section**.
7. In the **Reorder Sections** pane, all sections that you have defined are listed by section name. Use the **Handle** ≡ icon to move a section to reorder where it displays in the **Data Component** dialog to users. You can also use the **Delete** icon to remove the section from the data component.



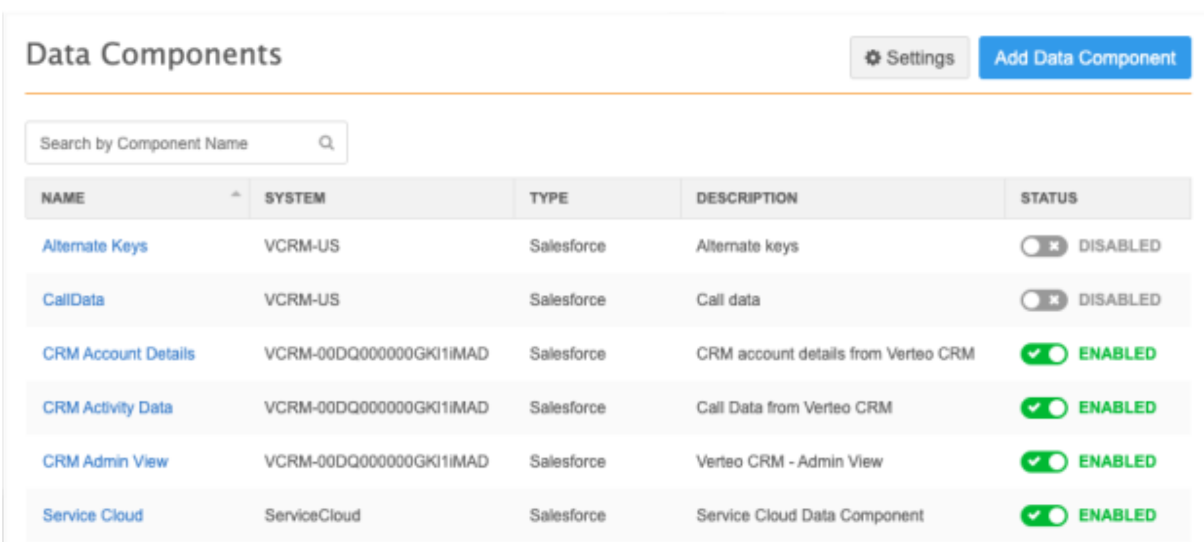
8. Click **Preview Component** to see how the Data Component will display for Network users. Enter a **Veeva ID** so you can preview the data for a record.

   Note: Your user permissions are used to preview the data component; not the country and user group permissions defined in the component. For example, if you submit a Veeva ID for a record in Spain but your data visibility profile permissions only include France and Germany, a permission error displays.

   The preview displays the component, all sections, and any data available for each section.



9. **Save** your changes. The component will be added to the Data Component page.



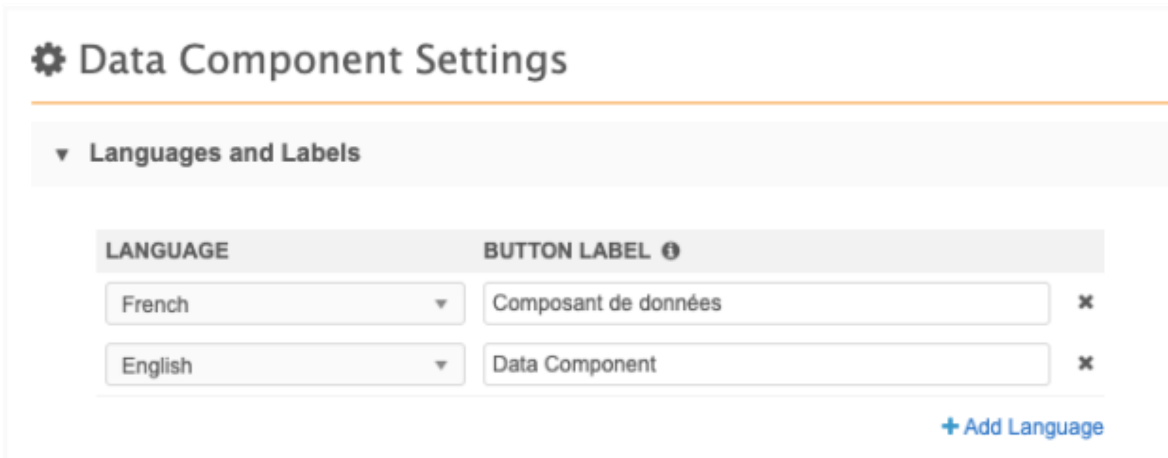
Data components can be enabled and disabled on this page. Disabled data components do not display on record profiles and data change requests.

Clone a data component

Use the **Clone** button to create a copy of the data component. Cloning the component copies most of the configuration except for the data component name or code.

Rename the Data Component button

Administrators can define the languages and labels for the **Data Component** button.



1. On the Data Components page, click **Settings**.
2. In the **Languages and Labels** section, click **Add Language** to define a localized label for the Data Component.

   By default, the **English** label is **Data Component**, but it can be changed.

3. **Save** your changes.

The button label will be updated for that language.

Reports

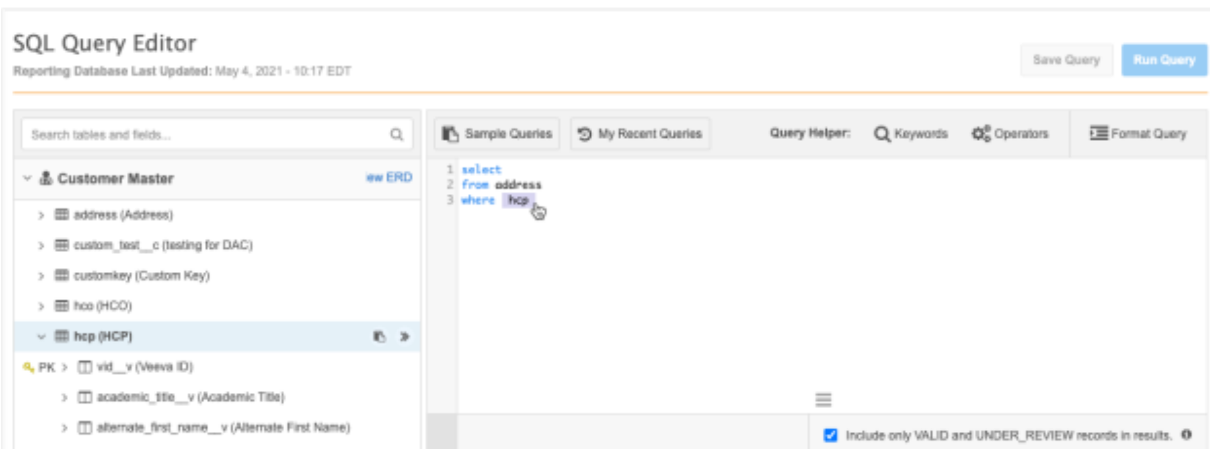
SQL QUERY EDITOR

You can now drag and drop tables, fields, and reference codes from the SQL Query Editor tree view into the query box so you can easily build your query.

This enhancement is enabled by default in your Network instance.

Drag and drop

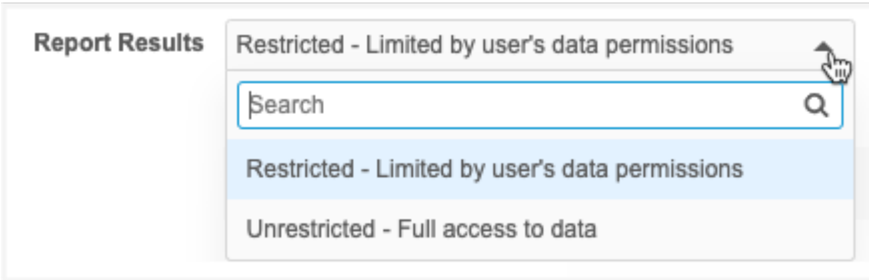
You can drag and drop tables, fields, and reference codes anywhere in the query box. When the table, field, or reference code is inserted, it remains highlighted so it's obvious where it was inserted. Spaces are automatically added before and after the item you drop into the query. After dropping an item into the query box, press the right-arrow key to continue writing your query.



REPORTING PERMISSIONS

Administrators can assign a new user permission called **Report Results** so users can run reports without any data restrictions applied.

By default, when you run a report, the results are based on the data that you have permission to access. This means that each report query is rewritten to calculate your data visibility profiles, inbox task groups, and any dynamic access control restrictions for custom objects. This can cause the query to be slow or to timeout. When your data permissions are ignored, the queries and reports will complete faster and fewer timeout errors will occur.



Supported users

Administrators can assign this permission to the following user types:

- System Administrators
- System and Data Admins
- Data Managers

Change the permission to **Unrestricted** for users that already have access to all data. Report queries are always rewritten to calculate a user's data permissions, so if a user has access to all the data in the Network instance, assigning the **Unrestricted** permission means that the report runs without being rewritten and will complete much faster.

Data permissions

When you run a report, Network checks the following permission features to know which data you have access to:

- Data visibility profiles
  - Primary country
  - Object filters (object type, specialty, record owner type, and so on)
- Dynamic access control
- Inbox task group filters

Note: Field restrictions will still be applied.

Based on the data that you have access to, Network rewrites the report query to apply these filters. These data permissions can be ignored to avoid query timeouts. The only filter that is applied is the **Include only Valid and Under_Review records in results** option if you select that before you run the report.

Supported report features

The **Report Results** permission applies to anywhere in Network that you run a query or report:

- SQL Query Editor
- Basic Report Builder
- Aggregate Report Builder
- Saved Reports (manually run)

> **Note:** Scheduled saved reports are run using the data visibility profile of the user who last edited the report. These reports now include the **Last Modified by** information. Administrators can update the permissions for that user to ignore data restrictions.

- Data Quality Reports
- Data Maintenance Subscriptions

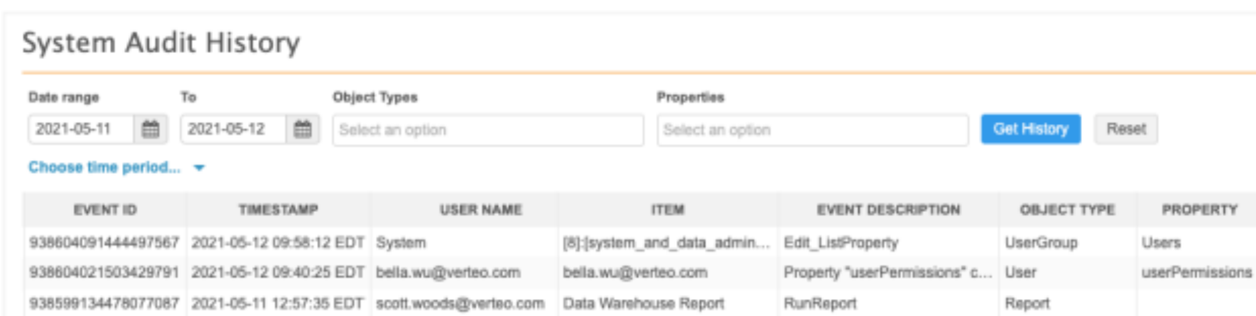
Apply the permission

By default, all users are restricted based on their data permissions.

1. In the Admin console, click **Users & Permissions > Users**.
2. Select a user.
3. In the **Additional Permissions**, expand the **Report Results** list and choose **Unrestricted - Full access to data**.

Logs

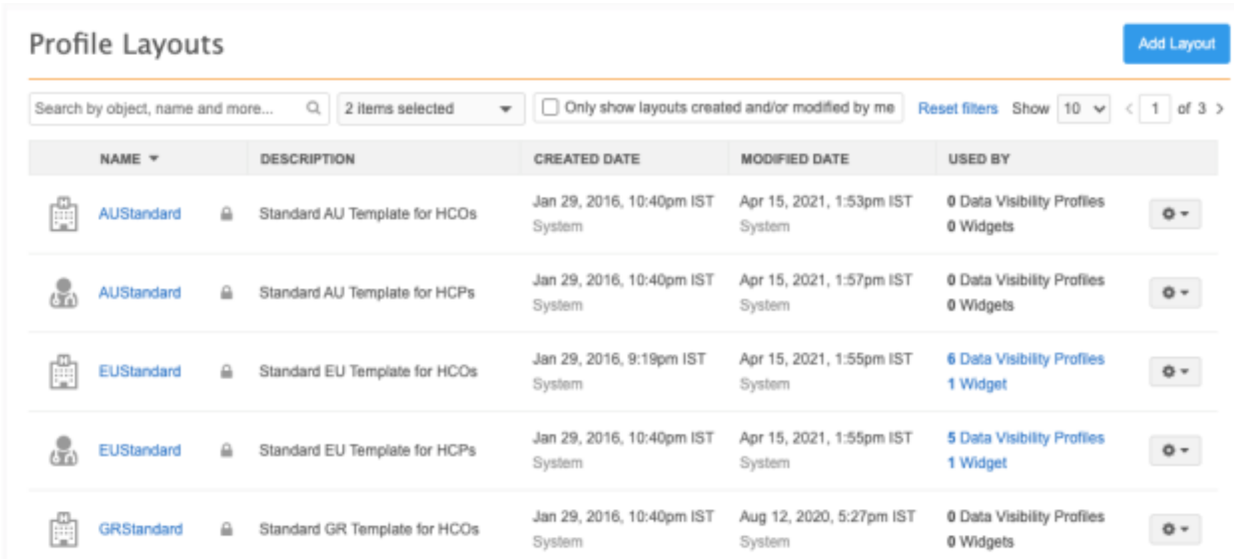
Changes to the **Report Results** permission are tracked in the System Audit Log.



Profile layouts

USABILITY ENHANCEMENTS

Profile layouts are updated to provide more information about each configuration and where it is being used.



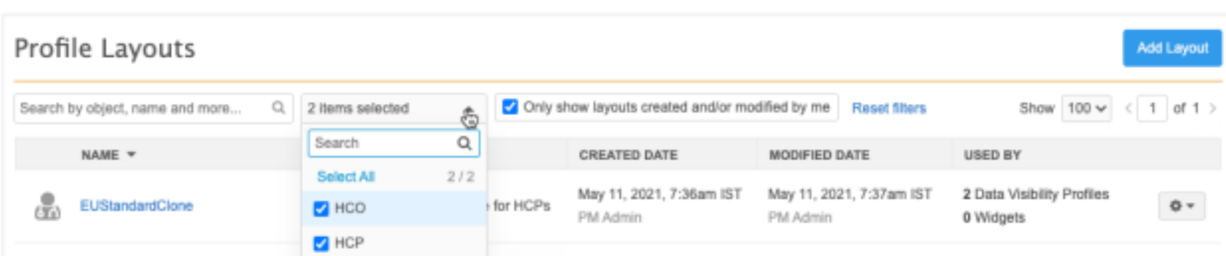
These enhancements are enabled in your Network instance by default.

Profile layouts list

The Profile Layouts page is updated to provide additional filtering and details for each layout configuration.

Filters

By default, the list displays all profile layouts for all objects and all users. You can filter the profile layouts list by object type and to display only the layouts that you have created or modified. If you make changes, click **Reset filters** to return to the default filtering.

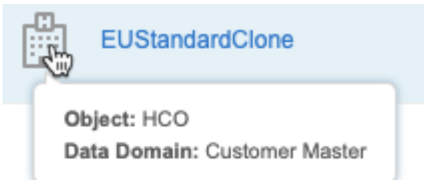


Details

The Profile Layouts list page (**Data Model > Profile Layouts**) is updated to provide the following details about each layout:

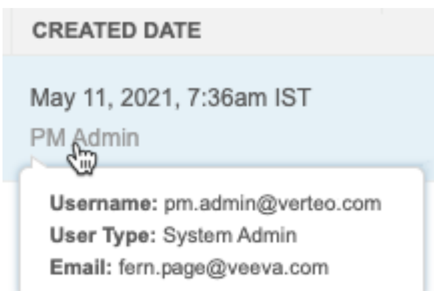
- **Name** - Click the column header to sort the layouts by name in ascending or descending order.

  Hover over the name for details about the object type and the data domains it belongs to.



- **Description**
- **Created Date** - Click the column header to sort the layouts by date.

  In the **Created Data** and **Modified Data** column, click the username to see the user type and email details for the user that changed the profile layout configuration.

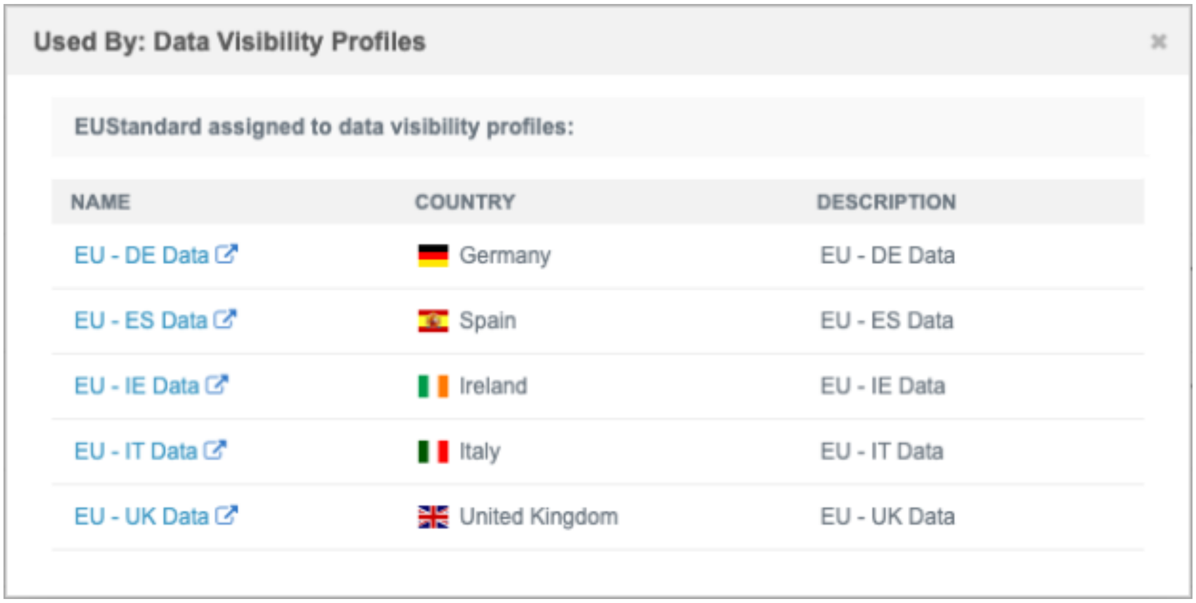


- **Modified Date** - Click the column header to sort the layouts by date.
- **Used By** - This column displays a count of the data visibility profiles and Network widgets that use the profile layout. Use this information to understand what features can be affected if you make changes to the layout.

  If the layout is being used, administrators can click the **Data Visibility Profile** or **Widget** link to see more details. Links do not display for Data Managers because data visibility profiles and Network widgets are managed by admin users only.

  Data visibility profiles

  Each data visibility profile is listed. Click the link to navigate to the data visibility profile configuration page.

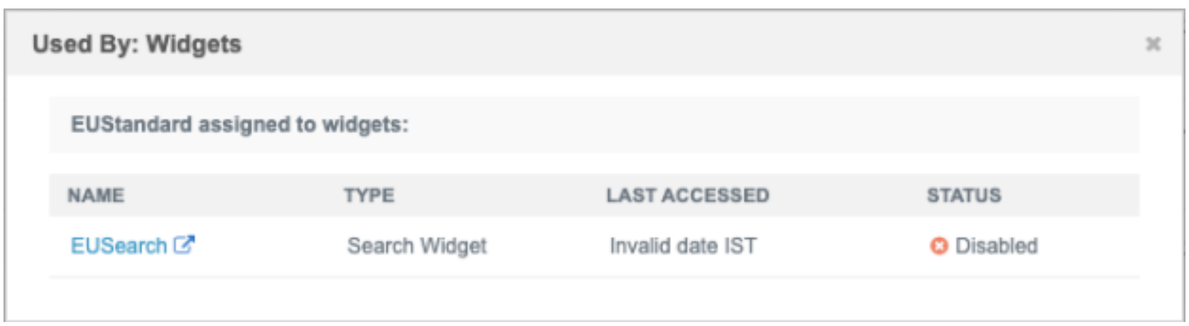

Used By: Data Visibility Profiles

EUStandard assigned to data visibility profiles:

NAME	COUNTRY	DESCRIPTION
EU - DE Data	Germany	EU - DE Data
EU - ES Data	Spain	EU - ES Data
EU - IE Data	Ireland	EU - IE Data
EU - IT Data	Italy	EU - IT Data
EU - UK Data	United Kingdom	EU - UK Data

Network widgets

Details about each widget is listed. Click the link to navigate to the widget configuration page.

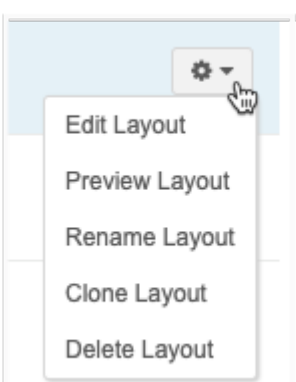

Used By: Widgets

EUStandard assigned to widgets:

NAME	TYPE	LAST ACCESSED	STATUS
EUSearch	Search Widget	Invalid date IST	Disabled

Profile layout actions

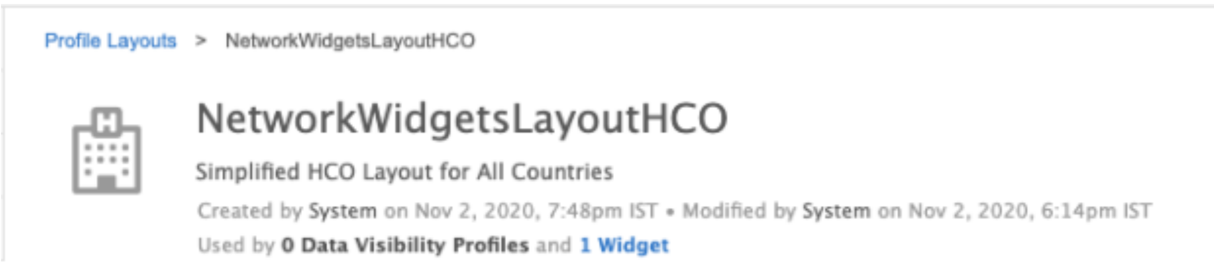
Use the **Options** icon to see the list of actions available for each layout. Standard layouts are read-only, so they have only a subset of the actions that custom layouts have.



Profile layout configurations

On each profile layout configuration page, the summary header includes more details about the creation date and user and the modified date and user. Hover over the username to display details about the user type and email address. You can also hover over the object icon for details about the object type and the data domains it belongs to.

A count of the data visibility profiles and Network widgets that use the layout also displays on the header. Administrators can click the **Data Visibility Profiles** or **Widgets** link to open a dialog for more details.



Source subscriptions

LOADING RELATIONSHIPS

21R1

Parent HCOs that are included in subscription feeds will be dropped or rejected if the related entity is not Valid or Under_Review. Occasionally, parent HCOs included in the feed have relationships to HCOs that have Invalid or Merged_Into record states. Now, to improve data integrity, these relationships will not be processed; the Parent HCO record will be dropped when the data is processed.

This enhancement is enabled by default. It applies to candidate records and opted-out records also.

Job warning

After the source subscription runs, if any Parent HCO records were not created, a job warning displays.

Example warning

```
A new PARENTHCO record was dropped from HCP <938061682273812525> due to
related entity <938061682274730046> being not valid.
```

Match

FORMATTED NAME FIELD

The `formatted_name__v` field for HCPs is now available to add to data groups and match rules in match configurations. Previously, the field could be used but only in advanced mode. Now, you can select the field from the lists in the Match Configuration UI.

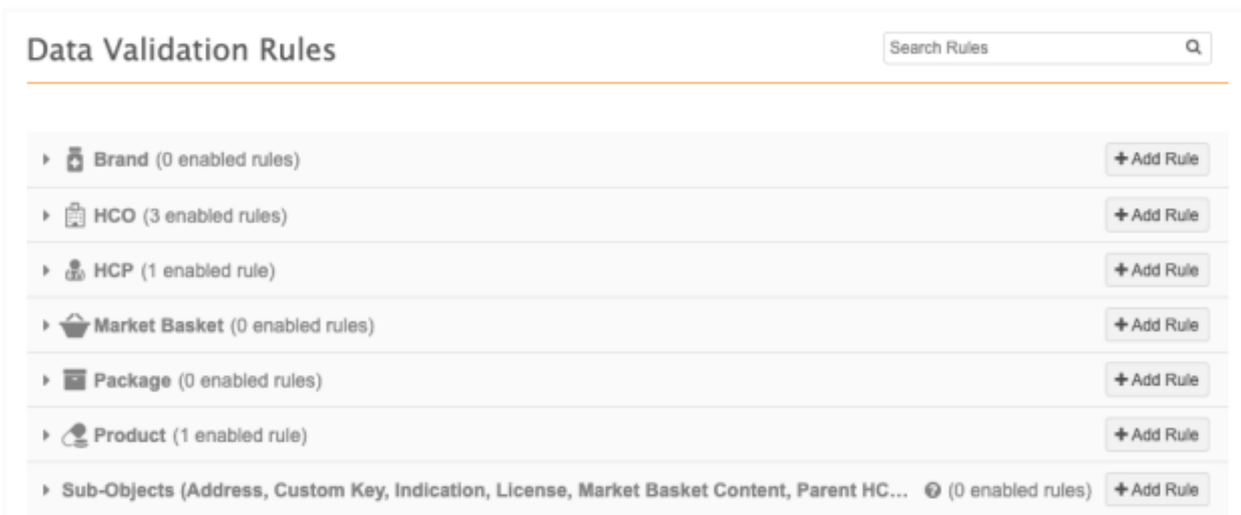
If the field is empty in the incoming data, it cannot be added to data groups. The default rules to populate the field typically take affect after the match process completes.

This enhancement is enabled by default in your Network instance.

Data validation rules

CUSTOM OBJECT SUPPORT

Data validation rules can now be added for custom main objects, sub-objects, and relationship objects . Previously, data validation rules supported Veeva standard objects, sub-objects, and relationship objects only.



This enhancement is enabled in your Network instance by default.

When custom main objects and sub-objects are enabled in your Network instance, they will automatically display in the list on the Data Validation Rules page; data does not have to be loaded into the object before they display. Rules are not automatically created for new custom objects; they must be defined.

For details about adding rules, see Creating data validation rules in the *Veeva Network Online Help*.

Deleting objects

When custom objects are deleted, data validation rules for the object are not automatically deleted. Ensure that data validation rules for deleted objects are disabled.

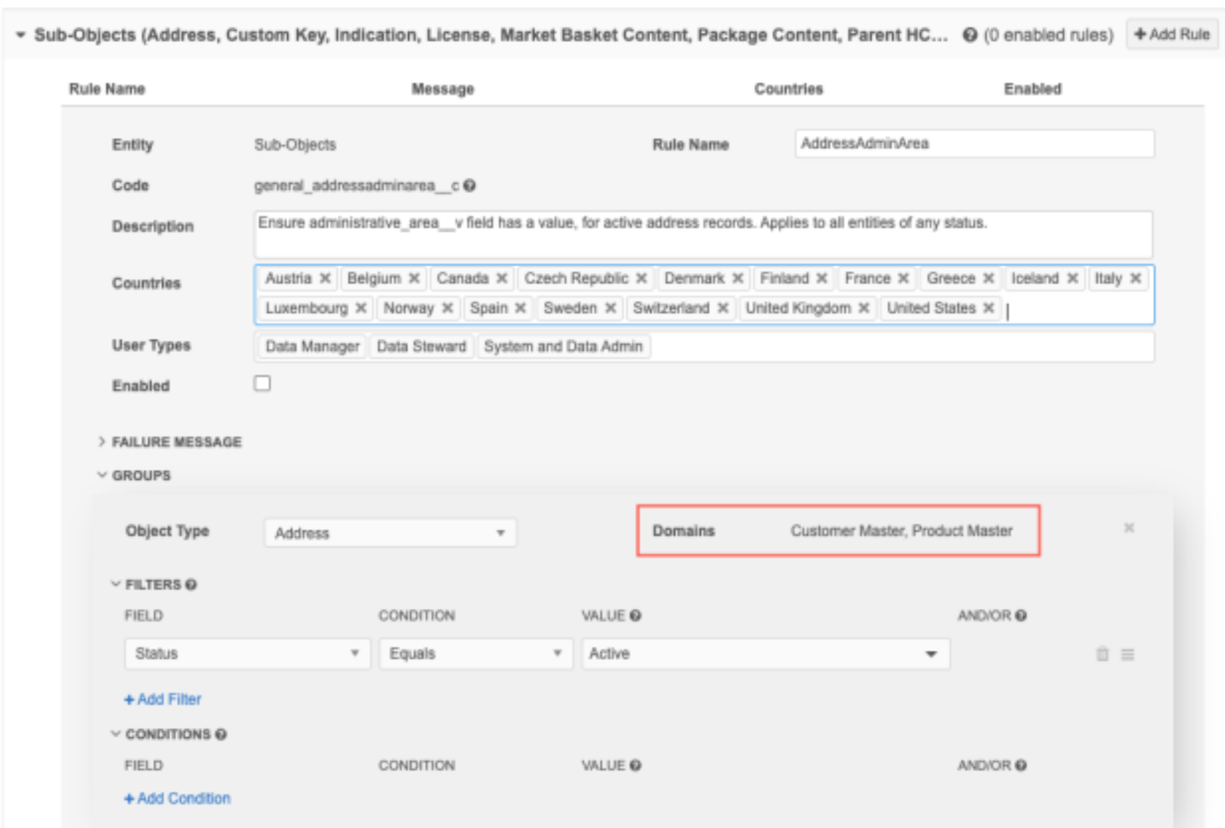
Sub-objects

Rules created for sub-objects and relationship objects apply to all related records, so if you add a new custom object that uses an existing sub-object, the existing rules will apply to those custom object records too. For example, if you add a Payer custom object and it uses the Address sub-object, all existing data validation rules for addresses will also apply to the Payer records.

Only enabled sub-objects and relationship objects will display in the **Sub-Objects** section on the Data Validation Rules page.

Data domains

Each rule now lists the data domains of the sub-object or relationship object. This information is useful to understand what main objects the sub-object or relationship object is associated with.



Operand support for field sets

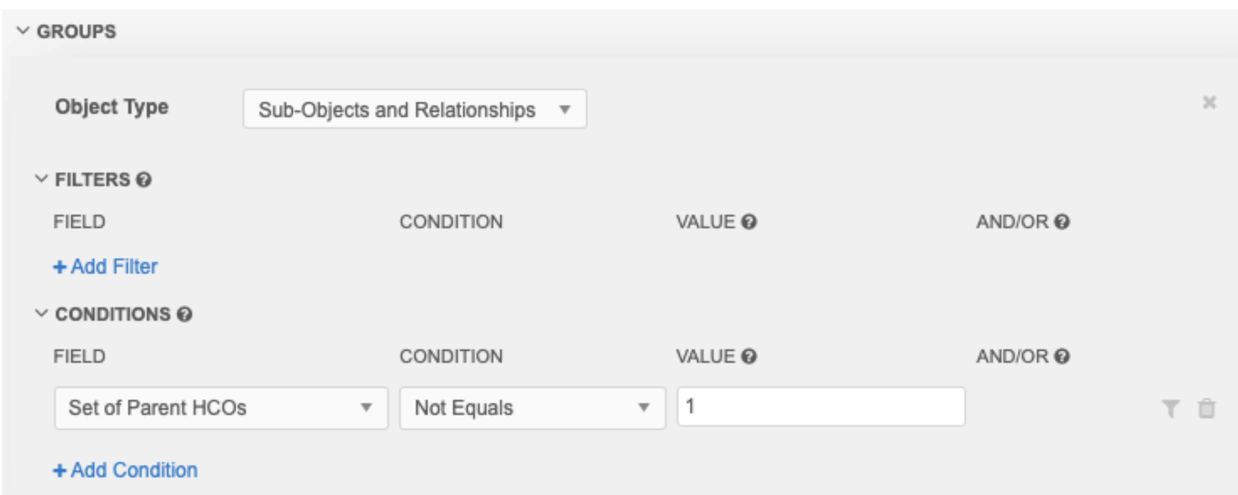
Some operands have been extended to support field sets (for example, `set_of_addresses__v`). The operands can be used to create rules to check for a specific count of sub-objects and relationship objects. Previously, you could check for duplicate or missing sub-objects. Now you can use the operands to check for a specific count of objects, or to check for character counts (for example, you can create a rule that names must be less than 10 characters).

The following operands support field sets:

- Equals
- Not Equals
- Less Than
- Greater Than
- Between

Example

Create a data validation rule to ensure that records have only one Parent HCO. Use the **Not Equals** operand to fail the rule for any entity that has more than one Parent HCO.



Field sets are supported for any main object. For example, when you create a rule for HCPs, you can choose a set of fields for any sub-object.

Data validation rules page

The list on the Data Validation Rules page is updated to help you easily view the supported objects and their existing data validation rules.

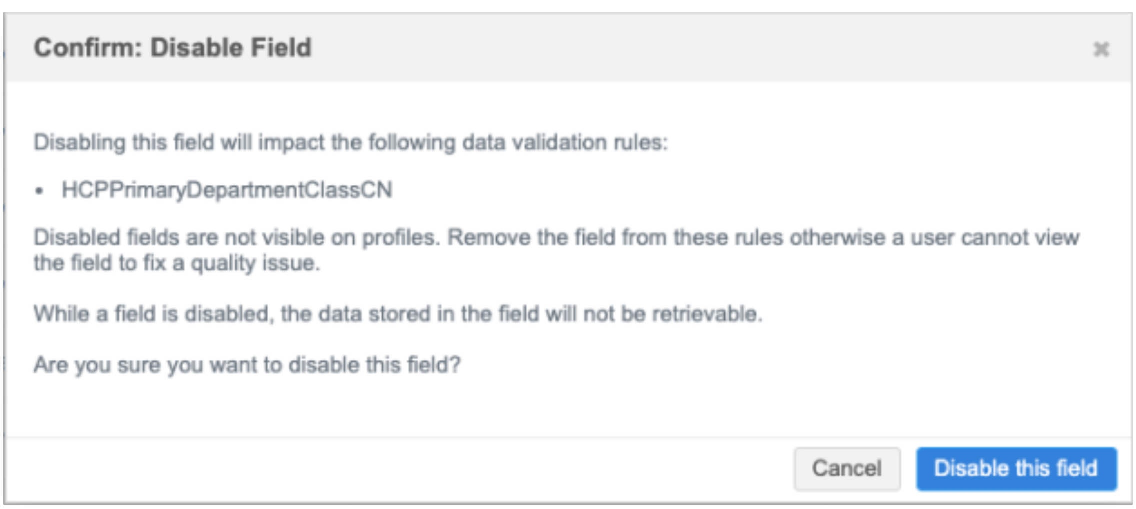
The following updates have been made:

- **All object sections** - All sections are collapsed by default so you can easily browse the page. Previously, each section was expanded by default.
- **Main objects** - These sections now contain the object icon and a count of the enabled rules. Expand the object to view the rules.
- **Sub-Objects**- This section lists all enabled sub-objects and relationship objects in your Network instance. A count of the enabled rules for all listed objects displays.

Disabling fields

When you disable a data model field, the confirmation message now lists the impacted data validation rules so you remember to remove the field from the rule.

Disabled fields are not automatically removed from data validation rules. If a disabled data model field is included in a data validation rule, the rule can still trigger but the field is no longer accessible in the Network UI. This means that Data Stewards cannot resolve the rule violation and continue processing a record change. Including this information in the confirmation message reminds administrators to update the data validation rule.



PROFILE PAGE ENHANCEMENTS

When data validation rules are triggered on record profiles, they display in the right pane above the preview boxes. The pane now remains in place when you scroll through the profile page. This is helpful when Data Stewards are resolving validation issues because the message remains in view as they scroll. This also means that the preview boxes are always in view on the profile for all users as they scroll the page.

Configuration management

CUSTOM OBJECT DEPENDENCIES

You can now remove data domains from export packages if at least one domain remains in the package for the main custom object. There is an automatic dependency between main objects and data domains. If you have a custom object in two different domains; both data domains are added when you move the custom object into the export package.

Previously, if you tried to remove a data domain and then you clicked **Validate Selection**, the domain would be moved back into the export package. Now, the domain is no longer added again if one domain remains in the package for the custom main object. This is helpful if you have data domains in your development environment that you do not want to export to production environments.

Note: If you remove all data domains, they will all be moved back into the package when you validate the export package .

This enhancement is enabled in your Network instance by default.

OPT OUT MATCH SETTINGS

The Opt Out Matching Settings can now be exported to target environments. When you are creating an export package, the **Opt Out Matching Settings** can be selected in the **Available Configurations** pane.

This enhancement is enabled by default in your Network instance.

API

Batch Reject/Approve Change Requests

You can now insert resolution note comments or codes for each data change request (DCR) when they are automatically accepted or rejected using the Batch API calls. Previously, a default resolution note was applied to each DCR. Now, users can view the specific comments to know why the DCR was rejected.

Parameters

Two parameters have been added to the Batch Reject Change Request and Batch Approve Change Request API to support this enhancement.

Name	Description	Required?
`comment`	A text resolution note.	False
`code`	A code from your resolution note template will be inserted as the note.	False

You can use the `comment` parameter or `code` parameter (if you have a resolution note template). If you provide both, the `comment` will override the template.

Sample PUT data

```
{
   "change_requests": [
     {
       "change_request_id": "938220286194942015",
       "comment": "This is custom comment",
        "code": "R-00010"
     }
   ]
 }
```

Sample response

```
"resolution_notes": [
                 {
                     "comment": "Duplicate change request submitted.",
                     "fields": [],
                     "created_date": "2021-02-09T10:46:44.125-08:00",
                     "code": "R-10008"
                 }
```

These enhancements are supported for Network API version 23 and later. If a resolution code or comment is applied using an older version of the API, or if you do not provide one of these parameters, the default resolution note (`Batch-Approve` or `Batch-Reject`) will be used.