



veeva Network

Veeva Network 21R3.1.1 Release Notes

February 2022



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About these Release Notes

These Release Notes describe all features that are included in Veeva Network 21R3.1.

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- **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

Veeva Network is tested and supported on the latest version of these browsers:

- Google Chrome™
- Apple® Safari®
- 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 this 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 21R3.1 minor release.

		ST	DS	DM	AD
Network widgets					
Hierarchy Explorer	The Hierarchy Explorer now supports custom hierarchies, displays parent affiliations for HCPs, and logs user searches in the Search Audit Log.	●	●	●	●
Search/Profiles					
Network hashtags	The #phs and #pharmacist hashtags have been added to the list of predefined hashtags.	●	●	●	●
Profiles					
Notes	Users can add notes to record profiles.	●	●	●	●
Data Model					
Field updates and merges	The process for updating and merging records now considers how the field is managed.			●	●
Match					
Default match rules for European countries	Default match rules have been added to the change_request subscription for HCPs and HCOs.			●	●
Default match rules for Singapore	Default match rules have been added to all subscriptions for HCPs and HCOs.			●	●
Source subscriptions					
Field mapping suggestions	The wizard now provides Network field suggestions to map to the column headers in your sample file.			●	●

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.



Network widgets

HIERARCHY EXPLORER WIDGET

The Hierarchy Explorer widget was introduced in 21R3.0 to help you explore entire health systems from a top-down approach. All levels of the hierarchy display so you can search through it to find new targets and to visualize and understand the hierarchy.

In this release, the Hierarchy Explorer is updated with the following enhancements:

- Custom hierarchies** - You can now create hierarchies so you can visualize primary relationships for specific business purposes. For example, you might create a hierarchy for sales roll-ups or for specific therapeutic areas (Neurology or Oncology).

Health Care Organization	HCO Type	HCP Roll-Ups		Major Class of Trade
Advanced Orthopedics And Sports Medicine 450 Sutter St Rm 400 San Francisco CA 94108-3997 View Child HCOs and HCPs	Organization, Group Practice	DIRECT 1	TOTAL 1	Medical Group Outpatient
Advanced Pain Diagnostics And Solutions 650 Howe Ave Ste 600 Sacramento CA 95825-4797 US View Child HCOs and HCPs	Organization, Group Practice	DIRECT 4	TOTAL 4	Medical Group Outpatient
Alta Bates Summit Medical Center Alta Bates Campus 2450 Ashby Ave Berkeley CA 94705-2067 View Child HCOs and HCPs	Organization, Hospital	DIRECT 2	TOTAL 2	Hospitals

- Parent organizations** - The **Explore HCPs** tab contains a powerful new column to display all affiliated HCOs for HCP in the health system. You can use this information to see other HCPs that work for the affiliated organization and the health system the HCO is affiliated with.

If an HCP has more than one affiliated HCO, click the **+ more** link to expand the column for more details.



Hierarchy Explorer > Sutter Health BETA

Sutter Health
2200 River Plaza Dr Sacramento CA 95833-4134
[View Profile](#)

All Hierarchies Sales Hierarchy Neurology Hierarchy Oncology Hierarchy Ownership Hierarchy

Explore HCOs **Explore HCPs**

Showing 132 Total HCPs in Sutter Health (129 directly connected HCPs)

Active Filters

Health Care Professionals	HCP Type	HCP Specialty	Medical Degree	Relationship Type	Parent Organizations
All Abil 75 El Real Palo Alto CA 94301-2302	Prescriber	Anesthesiology	Doctor of Medicine	Affiliation	Menlo Park Surgical Hospital (Sutter Health) + 2 more Hide
Parent Organization	HCO Type	HCP Roll-Ups	Relationship Type	Major Class of Trade	HCO Specialty
Sutter Health 2200 River Plaza Dr Sacramento CA 95833-4134 View Child HCOs and HCPs	Organization, Health System	DIRECT 129 TOTAL 132	Affiliation	Health Care System Administration	Unspecified specialty
California Pacific Medical Center Pacific Campus 2333 Buchanan St Bsmnt Level San Francisco CA 94115-1925 Health Care System: Sutter Health View Child HCOs and HCPs	Organization, CMS Teaching Hospital	DIRECT 7 TOTAL 7	CMS Hospital Claims	Hospitals	Multi Specialty Practice
Golden Gate Urology Webster 2100 Webster St Ste 222 San Francisco CA View Child HCOs and HCPs	Organization, Group Practice	DIRECT 1 TOTAL 1	Affiliation	Medical Group Outpatient	Urology, Vision Practice
Alie Chan 12 Mendo Ave Santa Rosa CA 95401-4330	Prescriber	Ophthalmology	Doctor of Medicine	Affiliation	Sutter Health + 1 more

- **Search audit** - Administrators can track the searches in the Hierarchy Explorer through the Search Audit Log. You can find search events using the Hierarchy Explorer Widget term in the **Search Origin** filter.

Search Audit History Export

Date range: 2022-01-09 To 2022-01-10 Search Origin: Hierarchy Explorer Widget X [Get History](#) [Reset](#)

Choose time period...

TIMESTAMP	NETWORK USER NAME	SEARCH USER NAME	STATUS	FOUND	RETURNED	QUERY	ADDRESS QUERY	DATA TYPES	ORIGIN
2022-01-10 11:04:54 EST	shane.io@verteo.veevanetw...	shane.io@verteo.veevanetw...	SUCCESS	3	3	*		HCO,HCP	Hierarchy Explorer Widget
2022-01-10 11:04:54 EST	shane.io@verteo.veevanetw...	shane.io@verteo.veevanetw...	SUCCESS	3	3	*		HCO,HCP	Hierarchy Explorer Widget
2022-01-10 10:49:23 EST	shane.io@verteo.veevanetw...	shane.io@verteo.veevanetw...	SUCCESS	132	50	*		HCP	Hierarchy Explorer Widget
2022-01-10 10:49:15 EST	diego.ma@verteo.veevanetw...	diego.ma@verteo.veevanetw...	SUCCESS	205	50	*		HCO	Hierarchy Explorer Widget
2022-01-10 10:49:06 EST	dana.harris@verteo.veevane...	dana.harris@verteo.veevane...	SUCCESS	77	0	*		HCO	Hierarchy Explorer Widget

Availability

The Hierarchy Explorer widget is available in Beta version. If you are interested in being an early adopter, contact your Network representative.



Search and Profiles

NETWORK HASHTAGS

Hashtags display on record profiles and in search results to summarize important details. They can also be used in search queries to improve search accuracy. Network provides a set of predefined hashtags, but you can also create your own hashtags.

New hashtags

The following predefined hashtags are now available:

Hashtag	Entity	Country	Tooltip (EN)
#pharmacist	HCP	United States, Canada	HCP is a pharmacist in the US and Canada.
#phs	HCO	United States	HCO is a PHS Outpatient Organization.

These hashtags are enabled by default in your Network instance.

Profiles

PROFILE NOTES

You can now add notes to record profiles so other users can see the information. For example, data stewards can add a note to alert users when an HCP has taken a leave of absence, or to indicate an HCP's call time preference for data verification.

All users, except Standard users, can view, edit, and delete profile notes if they have access to the main object through their data visibility profile.

The screenshot shows a user profile for Jan Lin. The profile includes a header with the user's name, role (Prescriber), and address. Below this is a 'Primary Information' section with fields for Name, Veeva ID, and HCP Type. To the right of the primary information is a 'SAMPLE ELIGIBILITY' section. On the far right is a 'Profile Notes' panel with a 'Modified Date' indicator. The notes panel contains three notes: a pinned note about maternity leave, a note about call time preferences, and a note about call verification.

This feature is enabled by default in your Network instance.



View notes

The **Profile Notes** section displays by default in the right panel on the Profile page, but you can choose to hide it.

Hide notes

- Click the **Hide Notes** button at the top of the Profile page. The **Profile Notes** section will be hidden.

Network remembers your preference and does not display the section until you open it again.

Create notes

Notes can be created for any valid record. They cannot be added to records with the following record states: Invalid, Deleted, or Merged_Into. If notes are added to a valid record and then the record state changes, the notes will still be visible; Merged_Into notes will be redirected to the surviving record.

Notes are specific to your Network instance. If you add notes to Veeva managed or third party managed records, your notes only display in your Network instance.

To create a note:

1. On any record profile, in the **Profile Notes** section, click **Add Note**.
 - If a record has no existing notes, click the **Add new note** link.
 - If there are existing notes, click the **Add Note** button
2. In the text box, type a title and the message.

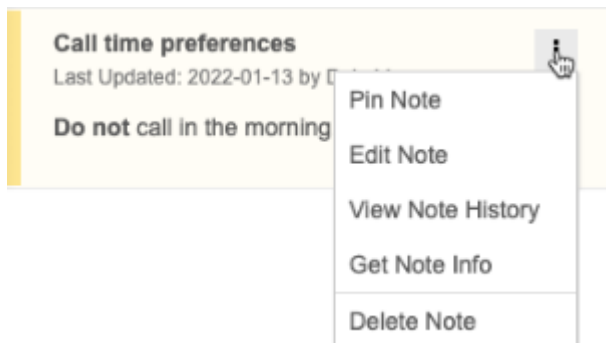
The screenshot shows a form for creating a note. It has a 'Title' input field at the top, followed by a larger 'Message' text area. Below the text area is a toolbar with icons for bold (B), italic (I), underline (U), text color (A with a dropdown arrow), bulleted list, numbered list, link, and a blue square representing the background color. At the bottom of the form, there is an 'Images' button with a plus icon, a 'Cancel' button, and a 'Submit' button.

3. Optionally, do any of the following to customize your note.
 - Format the text - Use bold, italics, or underline formatting. You can also change the color of the text and add a bullet or numbered list.
 - Add attachments - Add images to your message.
 - Insert hyperlinks - Include links to relevant websites.
 - Change the note color - Customize the background color of your note. The default color is blue.



Note options

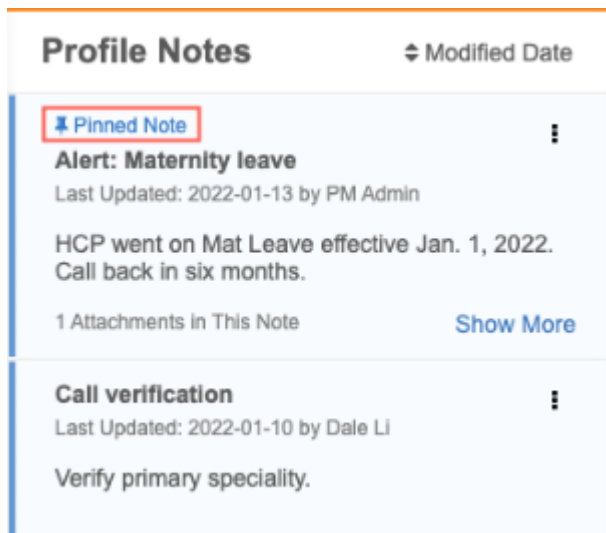
After a note is created, an **Option** menu displays. Click the menu to view the available actions.



See the following sections for more details about each action.

Pin notes

Pin a note so it displays at the top of the **Profile Notes** section. By default, notes display by created/modified date. When you pin a note, that note displays above all of the sorted notes. Newest pinned notes display first.



- To pin a note, click the **Options** menu on the note and select **Pin Note**.
- To unpin a note, click the **Options** menu on the note and select **Unpin Note**.

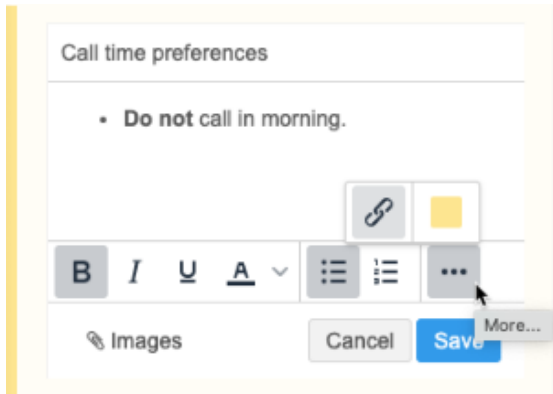
You can pin and unpin any note.



Edit notes

Click **Edit Note** to put the note in editing mode.

You can edit the title and message, add attachments (Images) and change the text formatting. Click the **More** button to add hyperlinks and change the note background color.

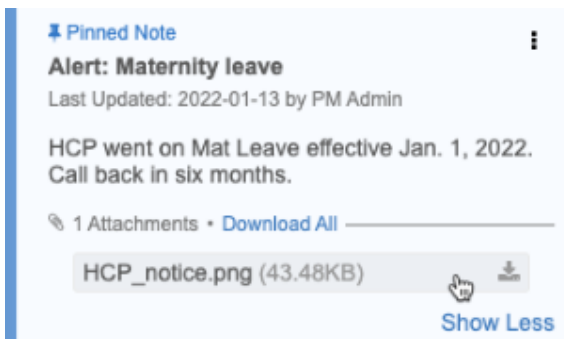



Add attachments

You can add attachments (images) to notes. This option is enabled by default in your Network instance.

When you view a note that includes attachments, you can do the following:

- **Preview** - Click the attachment name to preview the file.
- **Save** - Hover over a single attachment name and click the **Download** icon or click **Download All** to save all attachments on that note to your local computer.



- **Delete** - Click the **Options** menu on the note and select **Edit Note**. Hover over the attachment and click the **Delete**  icon.

If you delete an attachment, it is permanently removed from the database. The attachment name remains in the Note History.

Support for attachments

- **Attachment type** - Image files are supported (.jpg, .jpeg, and .png).
- **Maximum number** - Each note can contain a maximum of 10 attachments.
- **File size** - Each attachment can be a maximum file size of 5M.



Disable attachments

Administrators can disable the ability to use attachments. When the setting is disabled, users cannot add attachments to notes and attachments in existing notes do not display.

To disable attachment for notes:



1. In the Admin console, click **Settings > General Settings**.
2. In the **Feature Settings** section, find the **Notes** heading and clear the **Enable Attachment for Notes** setting.
3. **Save** your changes.

View note history

The Note History displays a snapshot of the note contents for each version. The version changes after existing content is changed and saved.

This behavior is different than a record's revision history which stores the difference between each version. You can use the details in the Note History to run queries on the Notes Revision History table in the SQL Query Editor to report on all changes made to a note. For more information, see the *Reporting on notes* section below.

Note History: Alert: Maternity leave		
VERSION	TIMESTAMP	USER
3	2022-01-13 18:33:08 GMT	PM Admin (pm.admin@verteo.com)
2	2022-01-13 18:23:44 GMT	PM Admin (pm.admin@verteo.com)
1	2022-01-13 18:13:11 GMT	PM Admin (pm.admin@verteo.com)

FIELD	VERSION 1	VERSION 2
Note Color		
Pinned Note	False	True
Note Title	Alert: Maternity leave	Alert: Maternity leave
Note Content	HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months.	HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months.
Attachments	image (12).png	image (12).png

The **Note History** can include the following details:

- Created date and time and user (Version 1)
- Modified date and time and user (Version 2 and greater)
- Changes to background color, pin state, title, content, and attachments.

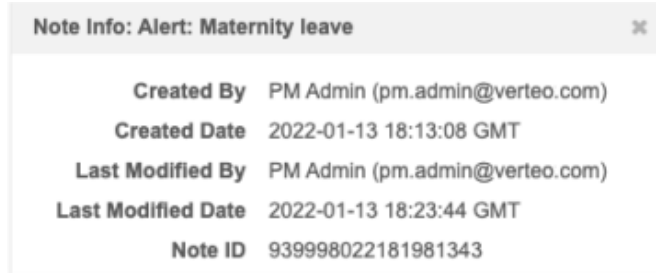
Note: When notes are deleted, their revision history is visible only in reporting. All users with access to the SQL Query Editor can run a report to get deleted notes content and revision history.



Note Info

All notes contain details about the user that created it, when it was created, and when it was last notified. Each note also has an ID. You can use this information in a query to run reports on notes.

To view these details, click the **Options** menu on the note and select **Get note info**.



Delete notes

Any user can delete a note that they have created or that was created by another user.

To delete a note:

1. On the note, click the **Options** menu and choose **Delete Note**.
2. In the confirmation pop-up, click **Delete**.

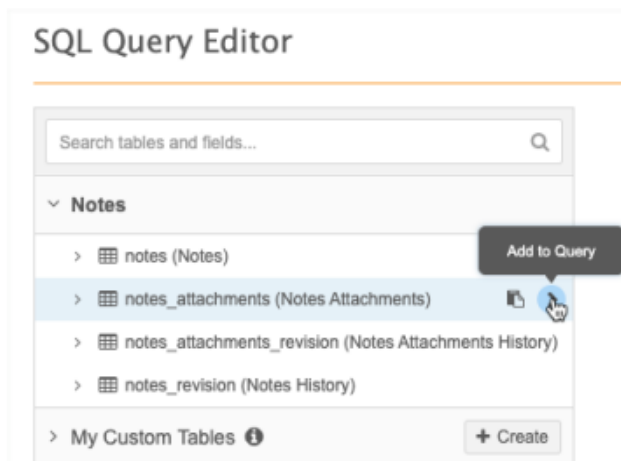
The note is permanently removed but its revision history is available in reporting. You can run a report to get deleted notes content and revision history.

Reporting on notes

Users can run SQL queries to extract details on notes by entity.

To run queries on profile notes:

1. In the SQL Query Editor, expand the **Notes** section. The tables and fields that are available for reporting are listed.
2. Hover over the table or field names to insert or copy them into your query.





Example queries

Example 1 - Notes content for a specific HCP

Use this query to report on all notes content for an HCP.

```
SELECT hcp.vid__v,
       formatted_name__v,
       hcp_status__v,
       notes.id,
       notes.content
FROM   hcp
LEFT JOIN notes
      ON hcp.vid__v = notes.entity_id
WHERE  hcp.vid__v = 243198766910276608
```

Results

Sample Queries
My Recent Queries
Query Helper:
Format Query

```
1 SELECT hcp.vid__v,
2       formatted_name__v,
3       hcp_status__v,
4       notes.id,
5       notes.content
6 FROM   hcp
7 LEFT JOIN notes
8       ON hcp.vid__v = notes.entity_id
9 WHERE  hcp.vid__v = 243198766910276608
10
```

Query Valid
 Include only VALID and UNDER_REVIEW records in results. ⓘ

Report Results (3 records)
Download Report
Create Custom Table
View Full Screen

VEEVA ID	NAME	STATUS	NOTE ID	COMMENT
243198766910276608	Jan Lin	Active	939998006974352543	<p>Do not call in the morning.</p>
243198766910276608	Jan Lin	Active	939998022181981343	<p>HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. </p>
243198766910276608	Jan Lin	Active	939998024457522335	<p>Verify primary speciality.</p>



Example 2 - Identify Deleted Notes for an HCP

When notes are deleted, you can use reports to view details about the deleted content.

```
SELECT entity_id,
       revision_id,
       id,
       hcp.formatted_name__v,
       hcp.hcp_type__v,
       hcp.hcp_status__v,
       created_at,
       created_by,
       change_type
FROM   notes_revision
      left join hcp
      on entity_id = vid__v
where change_type = 'DELETE' and hcp.vid__v = 243194480331588610
```

Results

The screenshot shows a query execution interface with a query editor at the top containing the SQL query. Below the editor, a status bar indicates 'Query Valid' and a checkbox for 'Include only VALID and UNDER_REVIEW records in results.' is checked. The results section, titled 'Report Results (1 record)', contains a table with the following data:

ENTITY ID	REVISION ID	NOTE ID	NAME	HCP TYPE	STATUS	CREATED AT	CREATED BY	CHANGE TYPE
243194480331588610	940003704217799839	940002813082406047	Ed Piran	Prescriber	Active	2022-01-14 13:18:09	pm.admin@verteo.com	DELETE

At the bottom of the results section, it says 'Displaying 1 to 1 of 1' and 'Show 25' with a dropdown arrow, and '1 of 1' with navigation arrows.



Example 3 - Report on all changes made to a note

Use reports to understand the differences between the versions of a note. The Note History displays a snapshot of the note contents for each version. The version changes after existing content is changed and saved. This behavior is different than a record's revision history which stores the difference between each version.

Example query

This query joins the **Note History** table with the **Notes** table.

```
SELECT
    notes_revision.id,
    notes_revision.revision_id,
    notes.content AS Current_Notes,
    notes_revision.content AS Previous_Notes,
    notes.created_at AS Created,
    notes_revision.created_at AS Modified,
    notes.created_by AS Created_By,
    notes_revision.created_by AS Modified_By,
    notes_revision.change_type
FROM
    notes_revision LEFT JOIN notes
        ON notes_revision.id = notes.id
WHERE
    id = 939998024457522335
```

Results

The screenshot shows a query execution interface. At the top, there are tabs for 'Sample Queries' and 'My Recent Queries'. A 'Query Helper' section includes search icons for 'Keywords', 'Operators', and 'Format Query'. The main area displays the SQL query from the previous block, with line numbers 1 through 15. Below the query, a green status bar indicates 'Query Valid'. A checkbox is checked with the text 'Include only VALID and UNDER_REVIEW records in results.' Below this, a 'Report Results (5 records)' section contains buttons for 'Download Report', 'Create Custom Table', and 'View Full Screen'. The results are shown in a table with the following columns: NOTE ID, REVISION ID, CURRENT_NOTES, PREVIOUS_NOTES, and CREATE. The table contains five rows of data, each representing a revision of a note with ID 939998024457522335.

NOTE ID	REVISION ID	CURRENT_NOTES	PREVIOUS_NOTES	CREATE
939998024457522335	940032691616353439	<p>Verify primary speciality.</p> <p>hello this is me trying to edit after sorting</p> <p> </p>	<p>Verify primary speciality.</p> <p>Edit</p>	2022-01
939998024457522335	940032684834688159	<p>Verify primary speciality.</p> <p>hello this is me trying to edit after sorting</p> <p> </p>	<p>Verify primary speciality.</p> <p>edit</p>	2022-01
939998024457522335	940032679974407327	<p>Verify primary speciality.</p> <p>hello this is me trying to edit after sorting</p> <p> </p>	<p>Verify primary speciality.</p> <p>edit</p>	2022-01
939998024457522335	940032678423563423	<p>Verify primary speciality.</p> <p>hello this is me trying to edit after sorting</p> <p> </p>	<p>Verify primary speciality.</p> <p>edit</p>	2022-01
939998024457522335	940032677297589407	<p>Verify primary speciality.</p> <p>hello this is me trying to edit after sorting</p> <p> </p>	<p>Verify primary speciality.</p>	2022-01



Example 4 - Report on notes that have attachments

Use this query to report on the notes that currently have active attachments.

Example query

This query joins the **Notes** table with the **Notes Attachments** table.

```
SELECT
    notes.entity_id,
    notes.id,
    notes.title,
    notes.content,
    notes_attachments.id,
    notes_attachments.filename
FROM
    notes INNER JOIN notes_attachments
        ON notes.id = notes_attachments.note_id
ORDER BY
    notes.entity_id,
    notes.id,
    notes_attachments.id
```

Results

The screenshot shows a query execution interface. At the top, there are tabs for 'Sample Queries' and 'My Recent Queries'. To the right, there are links for 'Query Helper', 'Keywords', 'Operators', and 'Format Query'. The main area contains a SQL query, which is identical to the one in the previous block. Below the query, a green checkmark indicates 'Query Valid'. A checkbox is checked, labeled 'Include only VALID and UNDER_REVIEW records in results.' Below this, there is a 'Report Results (8 records)' section with buttons for 'Download Report', 'Create Custom Table', and 'View Full Screen'. The results are displayed in a table with the following columns: ENTITY ID, NOTE ID, TITLE, COMMENT, ATTACHMENT ID, and ORIGINAL FILENAME. The table contains 8 rows of data. At the bottom, it says 'Displaying 1 to 8 of 8' and 'Show 25' records per page.



ENTITY ID	NOTE ID	TITLE	COMMENT	ATTACHMENT ID	ORIGINAL FILENAME
243154001430840322	940004598655487135	Supporting Notes	<p>Attachment contains verification notes</p>	940004598657322143	2022-01-14_17-05-22.png
243194480331588610	939998270359145631	Verification Documents	<p> HCP is valid</p> <p>See attachment</p>	939998270359342239	Dr Miranda_webmd.png
243198766910276608	939998022181981343	Alert: Maternity leave	<p>HCP went on Mat Leave Jan. 1, 2022</p>	940116168787102880	image (9).png
243218331434222597	939997111438809567	Call preferences	<p>See attachment</p>	939997111439068319	unnamed (5).png
243218331434222597	939997111438809567	Call preferences	<p>See attachment</p>	940021246936353951	2022-01-17_11-54-02.png
243223879743439872	940042277377739935	Verify for next call	<p>Medical degree</p> <p>See attachment</p>	940042277377739936	2022-01-21_08-47-02.png
243241076222067719	940116253825305759	Supporting notes	<p>Attachment for HCP</p>	940116253825305760	image (9).png
243243213412893697	940020058841549983	Alert: Leave of absence	<p>Sabbatical dates in attachment</p>	940020058841615519	unnamed (5).png



Example 5 - Report on the history of notes attachments

Users can add and remove attachments from notes. In the **Note History** example below, you can see that a user has removed two attachments from this note. When attachments are deleted, they are permanently removed from the database, but their name remains in the **Note History**.

VERSION	TIMESTAMP	USER
7	2022-02-03 15:01:01 GMT	PM Admin (pm.admin@verteo.com)
6	2022-02-03 15:00:21 GMT	PM Admin (pm.admin@verteo.com)
5	2022-02-03 14:59:22 GMT	PM Admin (pm.admin@verteo.com)
4	2022-01-31 15:07:17 GMT	PM Admin (pm.admin@verteo.com)

FIELD	VERSION 6	VERSION 7
Note Color		
Pinned Note	True	True
Note Title	Alert: Maternity leave	Alert: Maternity leave
Note Content	HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months.	HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months.
Attachments	image (12).png image (9).png unnamed (8).png	image (9).png

Example query

Use this query to view the history of changes for attachments to notes.

```

select notes.entity_id,
       notes.id,
       notes.title,
       notes.content,
       notes_attachments_revision.revision_id,
       notes_attachments_revision.id,
       notes_attachments_revision.filename,
       notes_attachments_revision.change_type

from notes
left outer join notes_revision ON notes.id = notes_revision.id
left outer join notes_attachments_revision ON notes_revision.revision_id =
notes_attachments_revision.revision_id

order by
notes.entity_id,
notes.id,
notes_attachments_revision.revision_id,
notes_attachments_revision.id
    
```



Results

Sample Queries | My Recent Queries | Query Helper: Keywords Operators Format Query

```

2 select notes.entity_id,
3 notes_id,
4 notes_title,
5 notes_content,
6 notes_attachments_revision_revision_id,
7 notes_attachments_revision_id,
8 notes_attachments_revision_filename,
9 notes_attachments_revision_change_type
10
11
12 From notes
13 left outer join notes_revision ON notes_id = notes_revision_id
14 left outer join notes_attachments_revision ON notes_revision_id = notes_attachments_revision_revision_id
15
16
17 order by
18 notes_entity_id,
19 notes_id,
20 notes_attachments_revision_revision_id,
21 notes_attachments_revision_id
22
23
24

```

Query Valid Include only VALID and UNDER_REVIEW records in results

Report Results (9 records) Download Report Create Custom Table View Full Screen

ENTITY ID	NOTE ID	TITLE	COMMENT	REVISION ID	ATTACHMENT ID	ORIGINAL FILENAME	CHANGE_TYPE
243198799910276608	939998022181981343	Alert: Maternity leave	->-HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. ->-	939998022430852607	939998022182048879	image (12).png	
243198799910276608	939998022181981343	Alert: Maternity leave	->-HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. ->-	939998063992919839	939998022182048879	image (12).png	
243198799910276608	939998022181981343	Alert: Maternity leave	->-HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. ->-	940066741151075487	939998022182048879	image (12).png	
243198799910276608	939998022181981343	Alert: Maternity leave	->-HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. ->-	940116168789971807	939998022182048879	image (12).png	
243198799910276608	939998022181981343	Alert: Maternity leave	->-HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. ->-	940116172671888351	939998022182048879	image (12).png	
243198799910276608	939998022181981343	Alert: Maternity leave	->-HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. ->-	940116172671888351	940116198787102880	image (9).png	
243198799910276608	939998022181981343	Alert: Maternity leave	->-HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. ->-	940116175304199327	939998022182048879	image (12).png	DELETE
243198799910276608	939998022181981343	Alert: Maternity leave	->-HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. ->-	940116175304199327	940116198787102880	image (9).png	
243198799910276608	939998022181981343	Alert: Maternity leave	->-HCP went on Mat Leave effective Jan. 1, 2022. Call back in six months. ->-	940116175304199327	940116172672011424	unnamed (8).png	DELETE

Merge considerations

Notes cannot be merged. When records are merged, the note from the losing record is repointed to the winning record.

When records are unmerged, notes are not repointed to the newly created record.

Anonymization

Notes (including their attachments) are deleted when the record is anonymized.

Network API

Notes are not supported in the Network API.

Audit

Administrators can track all notes activities (create, edit delete) in the System Audit Log.

System Audit History

Date range: 2022-01-06 To: 2022-01-11 Object Types: ProfileNote Properties: Select an option [Get History](#) [Reset](#)

Choose time period... ▾

Showing events for 2022-01-06 to 2022-01-11

EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE
939986289604955295	2022-01-11 16:29:23 GMT	leanh@verteo.com	entity[243241076222067719]...	Delete	ProfileNote		
939986289604955295	2022-01-11 16:29:23 GMT	leanh@verteo.com	entity[243241076222067719]...	Create	ProfileNote	color	("primary":#679
939986289604955295	2022-01-11 16:29:23 GMT	leanh@verteo.com	entity[243241076222067719]...	Create_ListProperty	ProfileNote	attachment	3054099861843
939986071872146591	2022-01-11 15:34:00 GMT	leanh@verteo.com	entity[243194480331588610]...	Edit	ProfileNote	isPinned	true
939986071872146591	2022-01-11 15:34:00 GMT	leanh@verteo.com	entity[243194480331588610]...	Edit	ProfileNote	pinTimestamp	1641915239117



Disable notes features and functions

Administrators can disable notes for their Network instance or disable the ability to add attachments to notes.

1. In the Admin console, click **Settings > General Settings**.
2. In the **Feature Settings** section, find the **Notes** heading.
 - To disable notes, clear the **Enable Notes in Profile Page** setting.
 - To disable the option to add attachments, clear the **Enable Attachment for Notes** setting.
3. **Save** your changes.

Data model

FIELD UPDATES AND MERGES

The dataflow functionality for record updates and merges now considers how standard (__v) and custom (__c) fields are managed.

Fields can be managed locally, managed by Veeva OpenData, or managed by a third party data provider. Previously, data could be lost when updates or merges occurred because the process was unaware of the field management. For example, if you do not subscribe to field-level OpenData subscriptions (Email, HIN, NCPDP, GeoSubdivision, or CIP), those standard (__v) fields can be used for local data. When a record was merged in Veeva OpenData, any local data in those fields could be lost when the updates came down to your Network instance. These enhancements ensure that the update and merge logic respects the management of the field data.

Additionally, the merge logic will now treat NULL and EMPTY fields as the same in customer instances.

These enhancements are enabled in your Network instance by default.

Supported activities

These process enhancements are supported in the following activities:

- source subscriptions
- OpenData subscriptions
- OpenData ad hoc download jobs
- merges

Null and non-empty fields

In customer instances, NULL and EMPTY fields will be treated as the same. NON-EMPTY fields will prevail over NULL fields during survivorship.

Example

The merge loser has a NON-EMPTY field. The winning record has a NULL value for the field and its source has an equal or higher rank in survivorship. The field value on the winning record will be the value from the merge loser.



Match

DEFAULT MATCH RULES FOR EUROPEAN COUNTRIES

New default match rules for HCPs and HCOs have been added for the `change_request` subscription. This is an internal subscription that is used to process all DCRs through the Network UI or API.

Countries

The new match rules are applied to all of the countries supported by Veeva OpenData in Europe:

- Albania (AL)
- Andorra (AD)
- Armenia (AM)
- Austria (AT)
- Azerbaijan (AZ)
- Bahrain (BH)
- Belgium (BE)
- Belarus
- Bosnia and Herzegovina (BA)
- Bulgaria (BG)
- Croatia (HR)
- Czech Republic (CZ)
- Denmark (DK)
- Estonia (EE)
- Finland (FI)
- France (FR)
- Georgia (GE)
- Germany (DE)
- Great Britain/United Kingdom (GB)
- Greece (GR)
- Hungary (HU)
- Iceland (IS)
- Ireland (IE)
- Italy (IT)
- Kazakhstan (KZ)
- Kyrgyzstan (KG)
- Kuwait (KW)
- Latvia (LV)
- Lebanon (LB)
- Liechtenstein (LI)
- Lithuania (LT)
- Luxembourg (LU)
- Moldova (MD)
- Monaco (MC)
- Montenegro (ME)
- Netherlands (NL)
- North Macedonia (MK)
- Norway (NO)
- Oman (OM)
- Poland (PL)
- Portugal (PT)
- Qatar (QA)
- Romania (RO)
- Russia (RU)
- Saudi Arabia (SA)
- Serbia (RS)
- Slovenia (SI)
- Slovakia (SK)
- Spain (ES)
- Sweden (SE)
- Switzerland (CH)
- Tajikistan (TJ)
- Turkey (TR)
- Turkmenistan (TM)
- Ukraine (UA)
- United Arab Emirates (AE)
- Uzbekistan (UZ)

These changes will be applied to all Network instances by default.

DEFAULT MATCH RULES FOR SINGAPORE

New default match rules for HCPs and HCOs in Singapore have been added for all subscriptions.

Subscriptions

- **Ad hoc match** - To view or edit the rules, go to **System Interfaces > Ad Hoc Match Configuration**.
- **Change request** - This is an internal subscription used for processing all add and change requests submitted through the Network UI and API.
- **Source subscriptions** - To view or edit the rules, go to **System Interfaces > Source subscriptions**. The rules apply to all new and existing subscriptions that use the default match rules.

These changes will be applied to the subscriptions in your Network instance that still use default match rules. If you have overridden the default match rules for a subscription, your changes will be preserved.



Source subscriptions


FIELD MAPPING SUGGESTIONS

The source subscription wizard now provides Network field suggestions to map to the column headers in your sample file. Suggestions are available for fields for all object types.

This enhancement is enabled by default in your Network instance.

Mapping fields














When you arrive at the last step of the wizard, the **Field Mappings** step, the columns from the sample file display in a table for each object tab.







The incoming column header names are analyzed to see if they map to Network fields. The columns that have field suggestions are highlighted in green rows and display a **Wand**  icon beside the column name.

Field Mapping

Health Care Professional (HCP)
CK
Address (ADDRESS)




Fields: All fields

FILE COLUMN	VEEVA NETWORK FIELD	SAMPLE FILE D/	SAMPLE
INVESTIGATORID 	Select a Network field	0c1415c1-9298-	10037de
LASTNAME 	Last Name (last_name__v) 	Wendt	Lagguth
FIRSTNAME 	First Name (first_name__v) 	Robin	Ren
MIDDLENAME 	Middle Name (middle_name__v) 		
 SALUTATION 	Prefix (prefix__v) 		
TITLE	Select a Network field		
GENDER  	Gender (gender__v) 	F	M
STATUS	Select a Network field		

Legend  Primary Key  Foreign Key  Foreign Key Related Object  Mapped Field  Network Suggestion  Referer

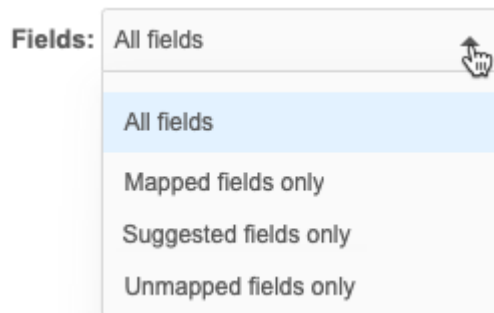


Review the suggestion and decide to use, change, or remove the suggestion.

- **Use** - No action required. The row remains highlighted and the **Wand**  icon remains.
- **Change** - If you change the suggested field, the row remains highlighted and a green checkmark  displays.
- **Remove** - If you remove the suggested field and do not select another field, the row highlighting and the **Wand**  icon are removed.

Filter the table

To filter the table of fields so you only see the field suggestions, expand the **Fields** list and choose **Suggested fields only**. The **File Column** will be filtered to only show the rows that include the suggested mappings.



About suggested fields

- Suggested fields are based on the country and object that you defined earlier in the wizard.
- Suggested fields cannot be reused. For example, `first_name__v` cannot be suggested for use in multiple fields.
- When multiple suggested field mappings are found, the highest ranked match is chosen. For example, if the column header is **Country** and it matches to Network's `country__v` and `birth_country__v` fields, the `country__v` field displays because it is the highest ranked match.
- Standard fields (`__v`) and custom fields (`__c`) are treated equally as potential matches to column headers.
- System fields and disabled fields are not supported for field suggestions.
- If you define your own column headers in the wizard, field mapping suggestions are not provided.
- Only useful suggestions display; fields are only suggested if they are good matches.