Veeva Network

Veeva Network 23R1.1.1 Release Notes

June 2023

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About these Release Notes

These Release Notes describe all features that are included in Veeva Network 23R1.1.

SUBSCRIBE TO RELEASE NOTIFICATIONS

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

Software releases and maintenance

- Veeva Trust Site

  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

The documents are posted in the following locations:

- Veeva Connect - Join the Network Community.

  To be notified as soon as the Release Notes are posted, go to your Veeva Connect profile and click **Settings**. On the Email Frequency page, expand the list and choose **Immediate**. Other notification options are **Daily** and **Weekly**.

- Veeva Product Support Portal

  Follow the Network Release Notes section to be notified when release documents are posted.

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

Changes have been made to the following enhancement since the Sandbox Release Notes were published:

- **Password management** – Administrators can now unlock user accounts and reset passwords for individual users.

  Note: The ability for users to unlock their own accounts will not be available in Network version 23R1.1.

The following topic has been added since the Early Release Notes were published:

- **Inactivating fields** – Before a field is inactivated, the confirmation dialog displays any impacted Network hashtags that will also be inactivated because the field is used in the hashtag rule.

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 23R1.1 minor release.

		ST	DS	DM	AD
Network widgets					
Hierarchy Explorer widget	Ancestors and rollup counts on the Summary View are now clickable so you can easily move through the hierarchy and explore the data.	●	●	●	●
Profiles					
Relationship owner	Affiliation badges display on relationships to identify if the relationship is locally managed, owned by OpenData, or owned by a third party provider.	●	●	●	●
Send to OpenData	Add requests that are sent to OpenData contain the default message, OpenData Takeover Request, in the Requester Notes.		●	●	
Data model					
Inactivating fields	Before fields are inactivated, the confirmation dialog displays any impacted Network hashtags that will also be inactivated.			●	●
Users					
Password management	Administrators can now unlock user accounts and reset passwords for individual users.				●
Integrations					
Hashtags in Veeva CRM	Network hashtags can be stored in an alternate field in CRM if the Account Identifier is already in use.			●	●

		ST	DS	DM	AD
API					
Custom fields on OpenData search results	Custom fields that contain default or calculated values can now display in the Search API for OpenData search results.	Admin and Developers			
Match API	Reference value labels and reference aliases are now supported in Match API results.	Developers			

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.

Hierarchy Explorer

SUMMARY VIEW

All of the ancestors and rollup counts on the Summary View are now clickable so you can easily move through the hierarchy and explore the data. The rollup counts open a popup to display a detailed view of the HCOs or HCPs in that grouping.

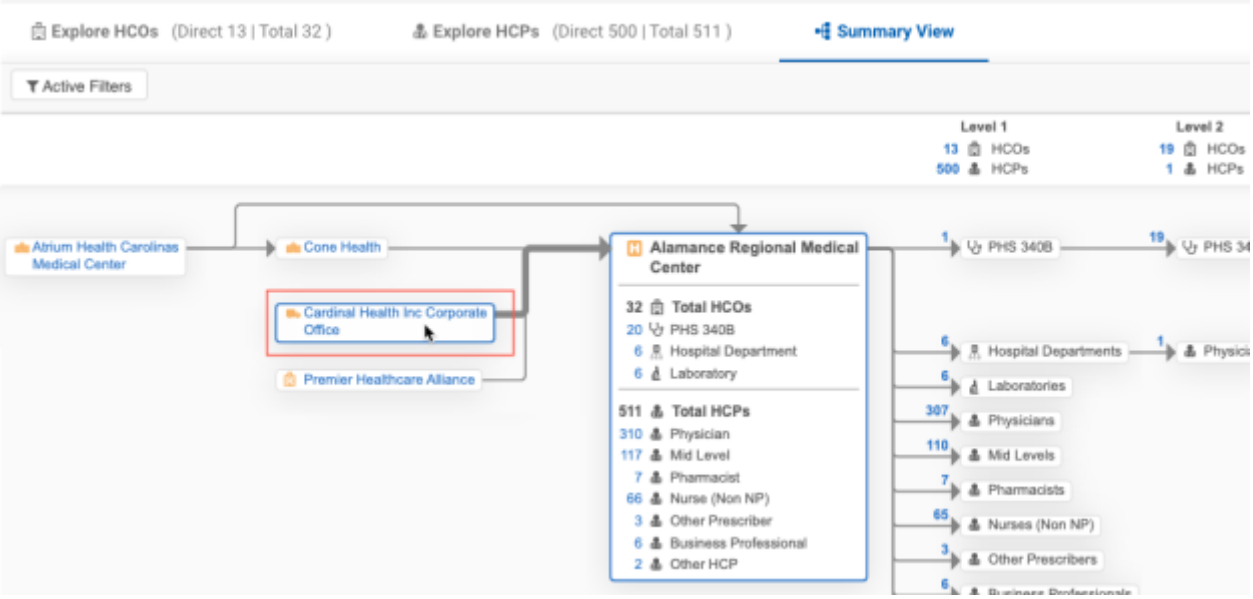
These enhancements are enabled by default in your Network instance.

Summary view focus

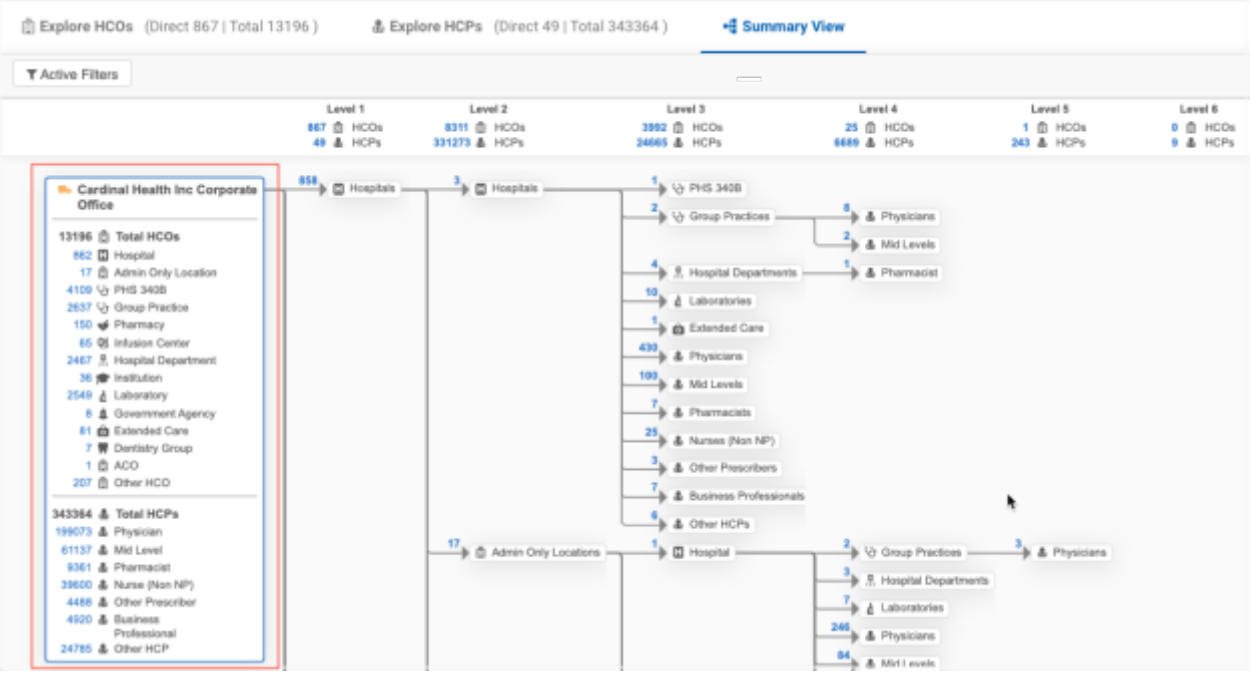
The Summary View can focus on any HCO in your hierarchy. Click an ancestor HCO to quickly change the focus of the view to that HCO. This enables you to quickly move up and down the hierarchy and view the rollup counts on different HCOs.

Example

On the Summary View for Alamance Regional Medical Center, click the Cardinal Health Inc Corporate Office ancestor (HCO).



The Summary View updates to focus on Cardinal Heath so you can see the HCO and HCP rollup counts for that HCO.

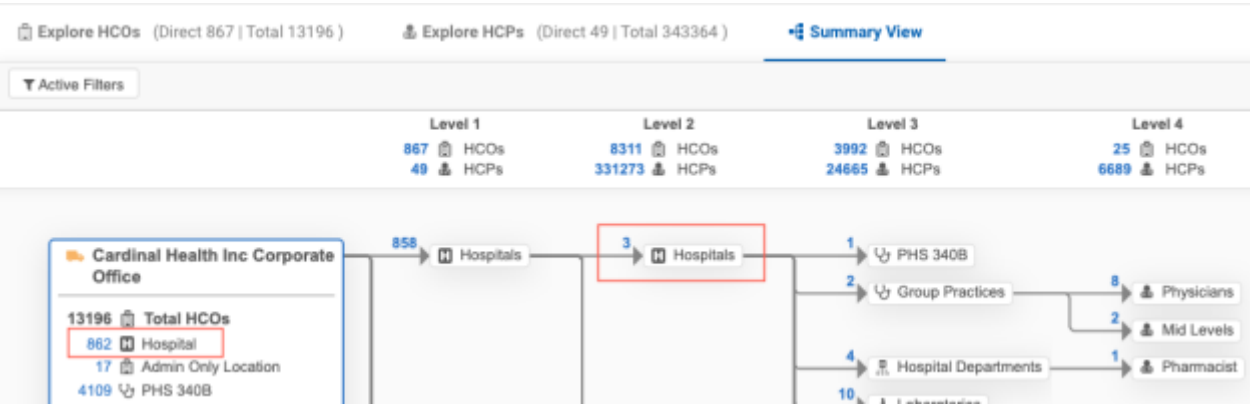


Rollup count details

All rollup counts on the Summary View are now links. Click the count to open a popup that displays the entity details for that group.

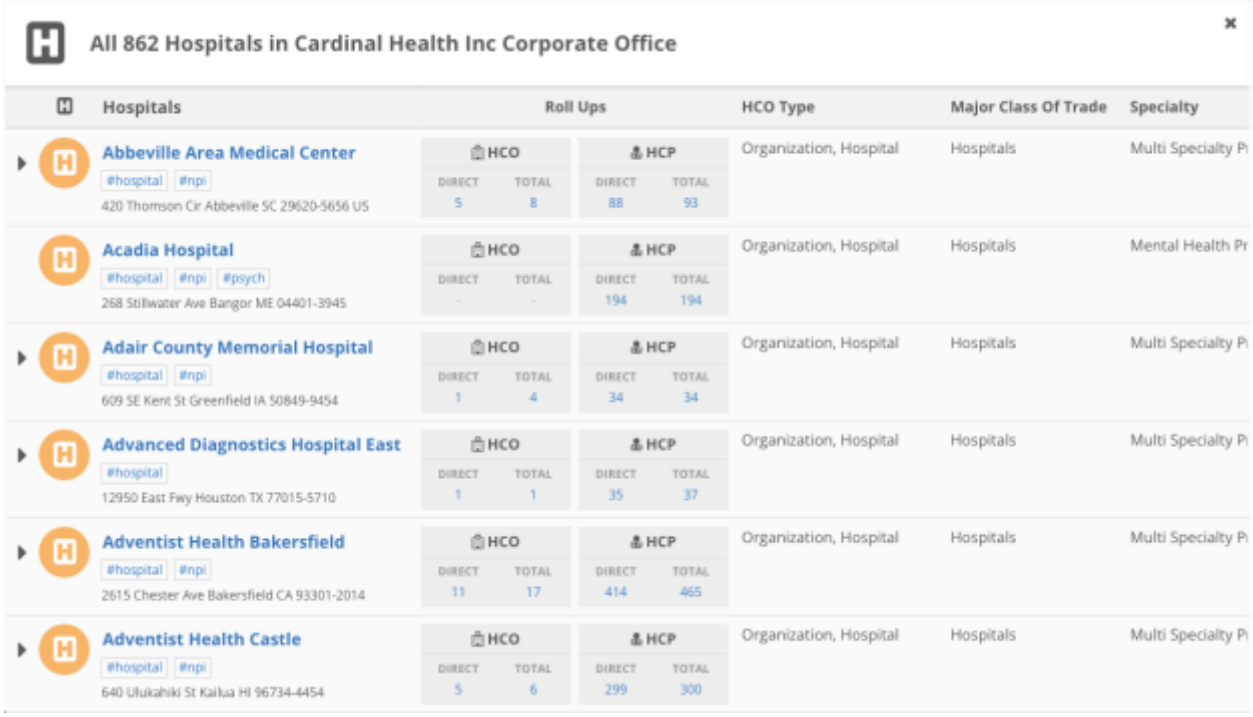
Example

On the Summary View, there are 862 Hospitals in the Cardinal Health HCO.



In the HCO breakdown section, click the Hospital (**862**) count.

A dialog opens to display all the accounts for the hospitals grouping for Cardinal Health.



To view the HCO or HCP rollups for a specific level, click the count in a hierarchy level. For example, in Level 2, click the **3** count beside Hospitals.

The dialog displays only the hospitals on this level of the hierarchy.

The left column in the group popups remains fixed as you scroll through the columns to view field details.

Tip: Any **Active Filters** that are applied to the hierarchy are also applied to entities in the rollup popups.

HCO count popup

When you click an HCO rollup count on the Summary View, the popup displays the following information:

- **Header** - Includes the HCO type and a count of the HCOs in the rollup and identifies the HCO that is the focus of the Summary View.

  The location in the hierarchy and the parent organization (and count) also displays when you click the rollup count in hierarchy levels.

  Example

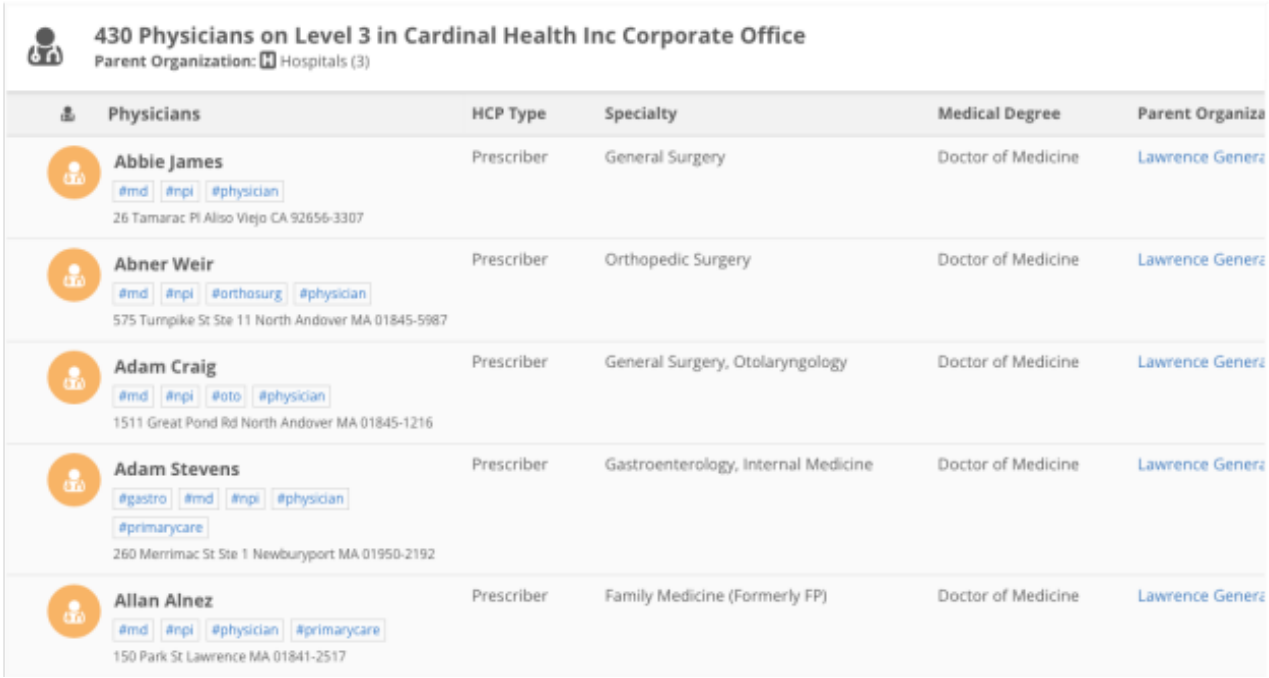
- **HCO details** - All the HCOs for the selected HCO type are listed in alphabetical order.

  The details for each HCO include:

  - HCO name and primary address - Click the HCO name to close the popup and change the Summary View to focus on that HCO.
  - Network hashtags
  - Rollup counts for HCOs and HCPs - Clicking a rollup closes the popup and opens the **Explore HCO** or **Explore HCP** tab with that HCO in focus.
  - Child affiliations - Click the **Caret** icon to expand the HCO and view child affiliation details.
  - HCO fields - All of the fields that display on the **Explore HCO** tab in the Hierarchy Explorer.

HCP count popup

Click an HCP rollup count on the Summary View to view details about the entities in the hierarchy.



The popup displays the following information:

- **Header** - Includes the HCP type and a count of the HCPs in the rollup and identifies the HCO that is the focus of the Summary View.

  The location in the hierarchy and the parent organization (and count) also displays when you click the rollup count in hierarchy levels.

  Example

- **HCP details** - All the HCPs of the selected HCP type are listed in alphabetical order by first (given) name.

  The details for each HCP include:

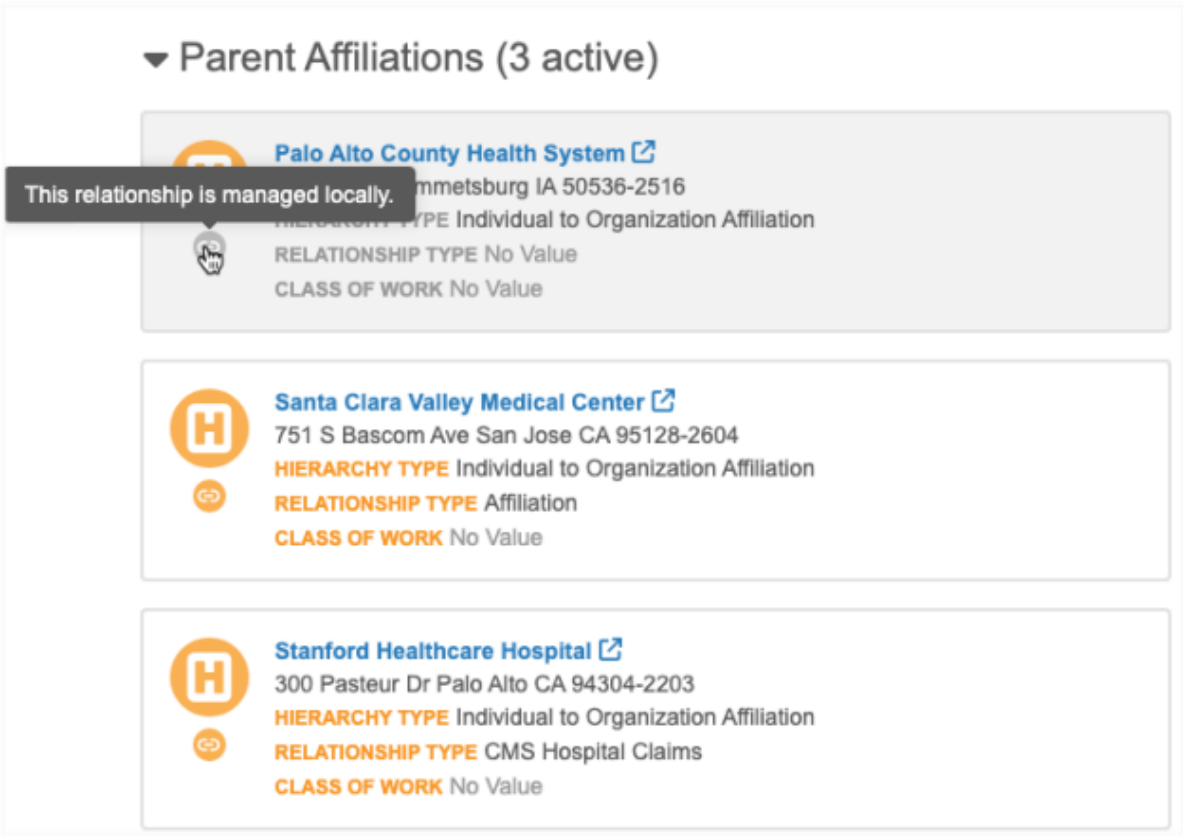
  - Name and primary address of the HCP
  - Network hashtags
  - Parent Organizations - Click the parent organization name to close the popup and change the focus of the summary view to that HCO.
  - HCP fields - All of the fields that display on the **Explore HCP** tab in the Hierarchy Explorer.

Profiles

RECORD OWNER FOR RELATIONSHIPS

Relationship objects now contain Affiliation badges to identify if the relationship is locally managed, managed by OpenData, or managed by a third party data provider.

This is helpful for understanding who owns the affiliation data for troubleshooting purposes.



This enhancement is enabled by default in your Network instance.

Supported objects

Affiliation badges are supported for Veeva relationship objects (Parent HCOs) and custom relationship objects.

Badges on Veeva relationship objects

Badges display below the HCO icon on **Parent Affiliation** and **Child Affiliation** summary cards on the Profile page and on profile previews.

The badges indicate the following:

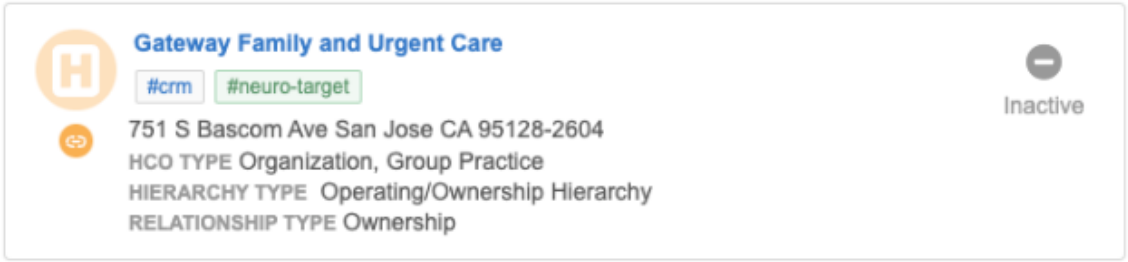
- **Record owner** - The badge color identifies the relationship owner.
  - Gray - Locally managed records (not in China).
  - Green - Locally managed records that are in China.
  - Orange - Veeva OpenData managed records.
  - Blue – Third-party managed records.
- **Relationship status and state** - The badge is dimmed if the relationship status (parent_hco_status__v) is not Active or the relationship record state (record_state__v) is not Valid or Under Review.

  Related entity

  The record state and status of related entity (HCO) can be different from the relationship's state and status.

  Example

  The related entity in this parent affiliation is inactive, but the relationship is active and valid. In this case, only the HCO icon is dimmed.



Tip: When the **Inactive** badge displays on summary cards, it identifies that either the related entity or the relationship is not active.

Examples of badges

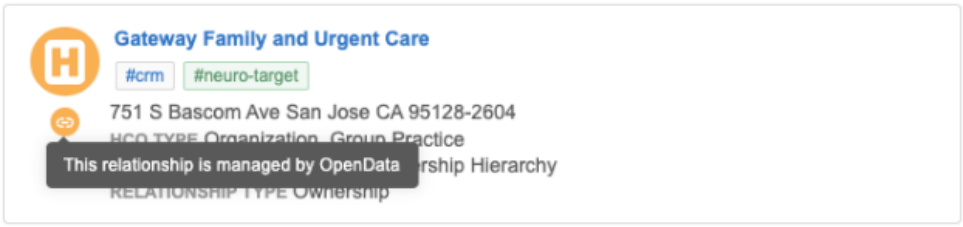
In these examples, the related entity (HCO) is managed by Veeva OpenData and the Parent HCO relationship is locally managed.

Related Entity	Relationship	Object Icon and Affiliation Badge
Record status = Active and Record state = Valid/Under Review	Relationship status = Active and Record state = Valid/Under Review	
Record status = Active and Record state = Valid/Under Review	Relationship status = not Active or Record State = not Valid/Under Review	
Record status = not Active or Record State = not Valid/Under Review	Relationship status = Active and Record state = Valid/Under Review	
Record status = not Active or Record State = not Valid/Under Review	Relationship status = not Active or Record State = not Valid/Under Review	

Tooltips

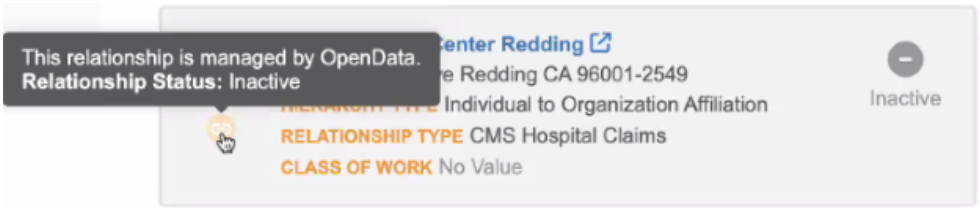
Relationship owner

Hover over the badge to quickly understand the owner of the relationship.



Relationship status and state

If the relationship is not Active or is not Valid/Under Review, the tooltip explains why the Affiliation badge is dimmed.



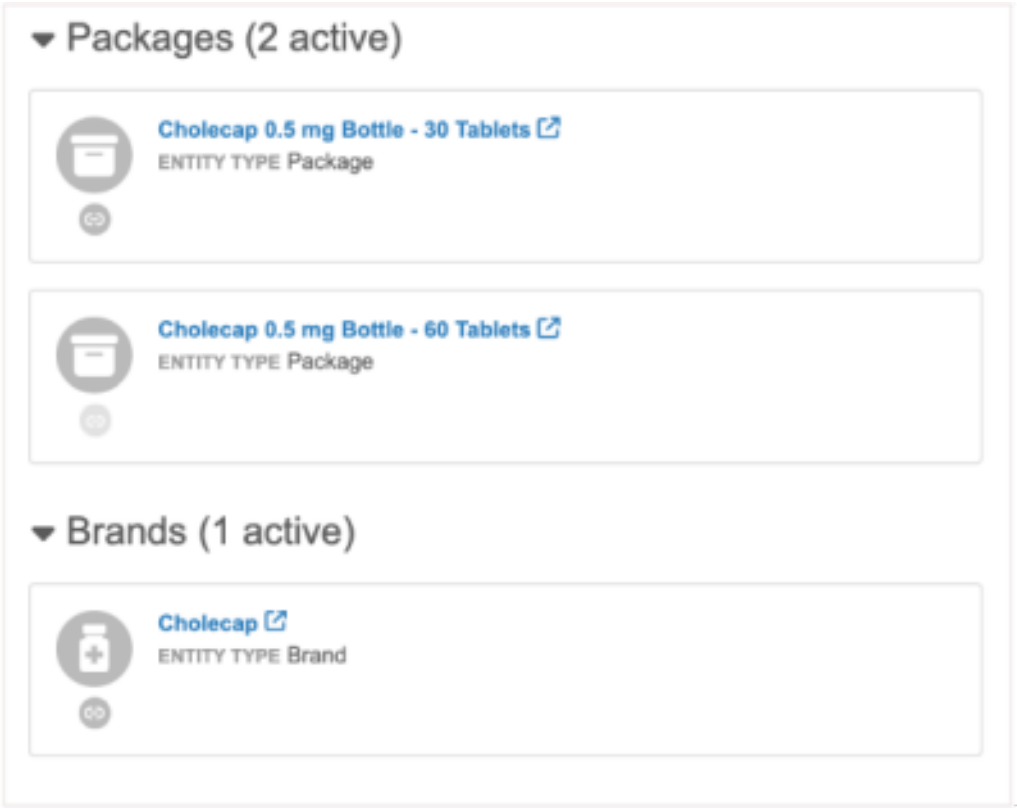
The relationship state or status does not display in the tooltip if the relationship is Active and Valid/Under Review.

Badges on custom relationship objects

Custom object relationships are always managed locally. The Affiliation badge can help you to easily identify which objects on the Profile page are relationship objects.

You can also use the badge to identify which relationships are not Active or Valid/Under Review.

Badges display below the custom object relationship icon on summary cards on the Profile page and on profile previews.



SEND TO OPENDATA

Add requests that are sent to OpenData now retain the default message, `OpenData Takeover Request`, in the Requester Notes.

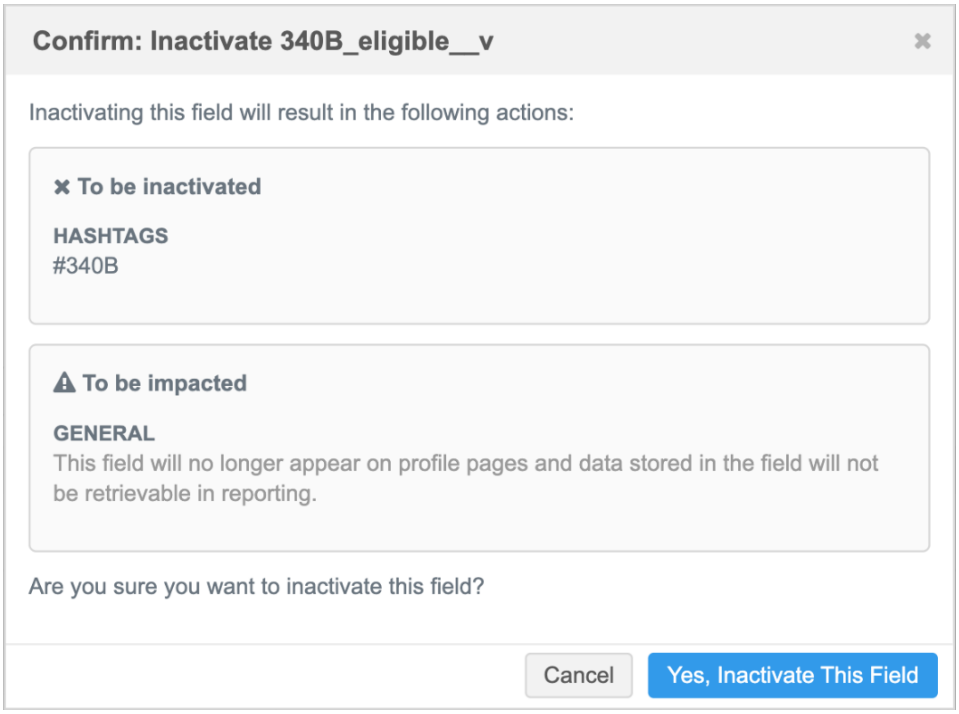
Local Data Stewards can add comments to the Requester Notes to help OpenData verify the add request. Comments are now appended after the default message so OpenData Data Stewards can easily identify these types of requests.

This enhancement is enabled by default in your Network instance.

Data model

INACTIVATING FIELDS

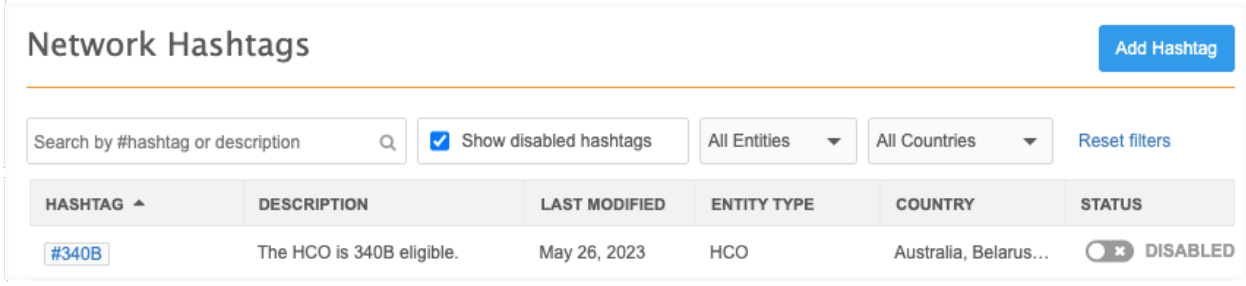
Inactivating a data model field can impact Network hashtags. If the field is used in hashtag rules, those hashtags will also be inactivated. To ensure that Administrators and Data Managers are aware that hashtags will be inactivated, the list of affected hashtags now displays in the confirmation dialog before a field is inactivated.



This enhancement is enabled by default in your Network instance.

Inactivated hashtags

When a field is inactivated, hashtags that use the field in a rule are inactivated and the modified date for those hashtags is updated (**Data Model > Network Hashtags**).



Users

PASSWORD MANAGEMENT

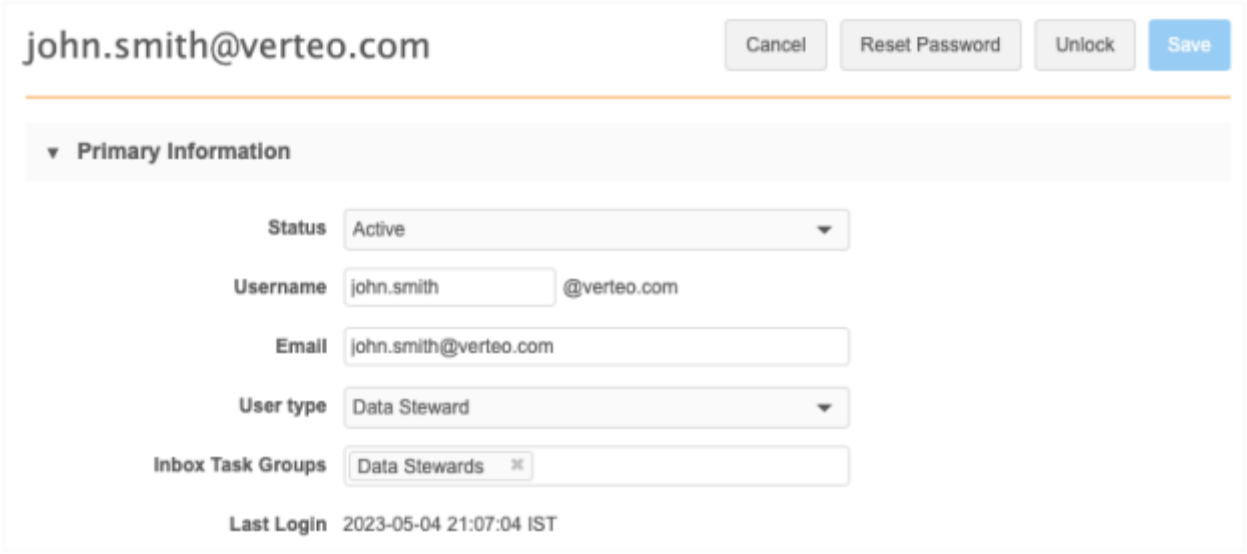
For security, users are locked out of Network after five consecutive login attempts. To regain access to Network, Network Administrators can now unlock your account or reset your password. Previously, resetting your own password was the only option.

These new options are supported for active users that do not use single sign-on.

This enhancement is enabled by default in your Network instance.

Managing accounts from the user page

When you become locked out of your account, Administrators can now unlock your account so you can continue using your current password, or they can reset your password if you have forgotten it.

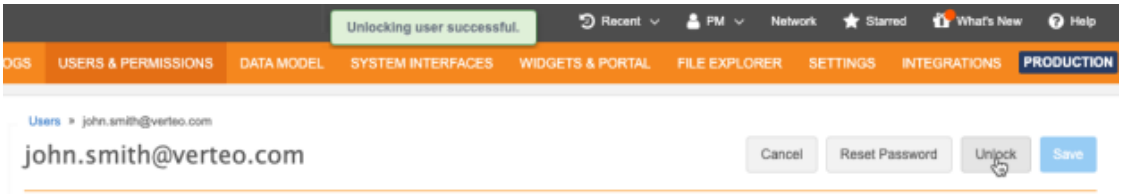


To manage a user's password:

1. In the Admin console, click **Users & Permissions > Users**.
2. Select the user to open their account page.
3. Click **Unlock** or **Reset Password** on the user page.
    - **Unlock** - Allow the user to regain access Network using their current password.

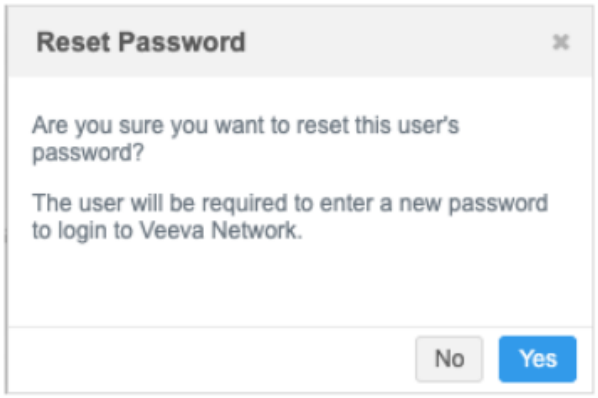
      Note: The **Unlock** button displays only if an active user is locked out.

      A message displays to indicate that the user has been unlocked.



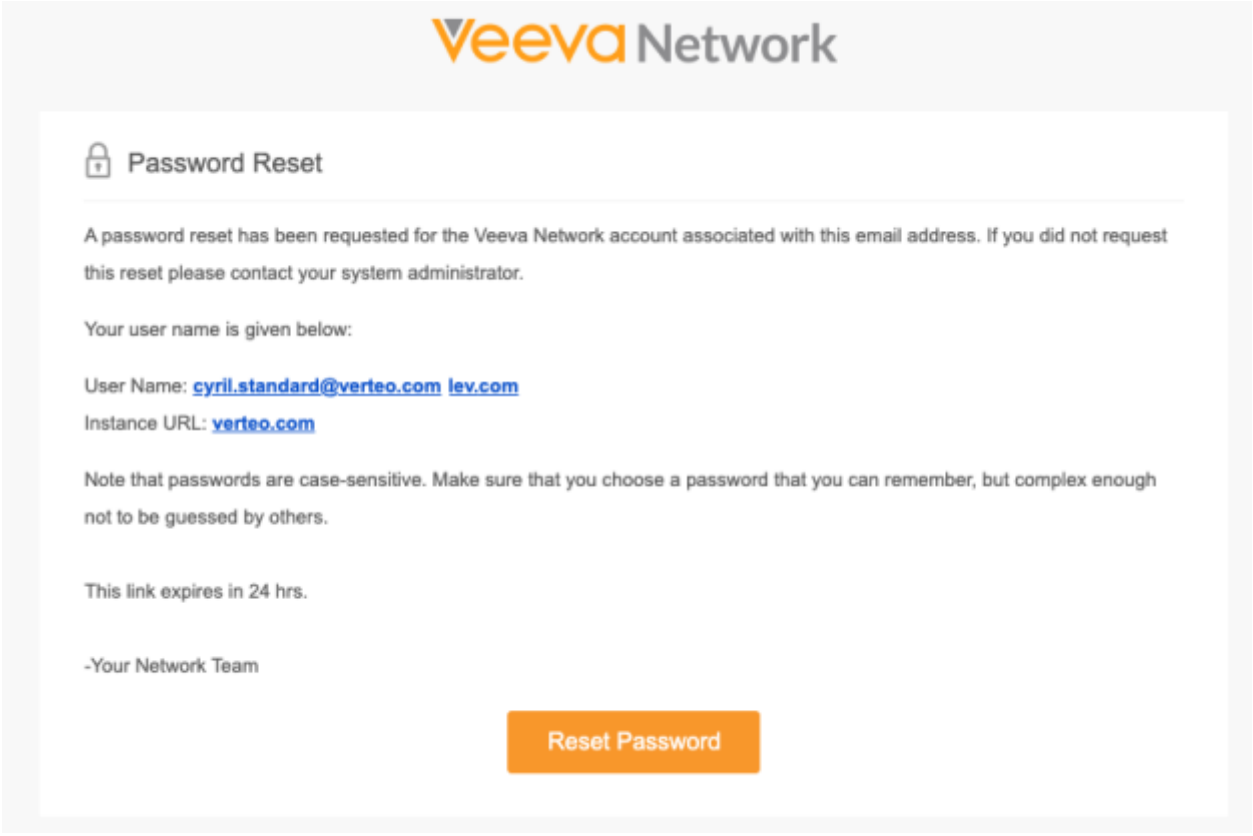
- **Reset Password** - The user will receive an email to reset (change) their password so they can regain access to Network. This button displays on all user account pages by default.

  After you click the button, confirm that you want to reset the password for this user.



  A message displays to indicate that the password reset is complete.

  Users will receive an email to notify them that their password has been reset. The email is sent from `network-emails@veevanetwork.com`.



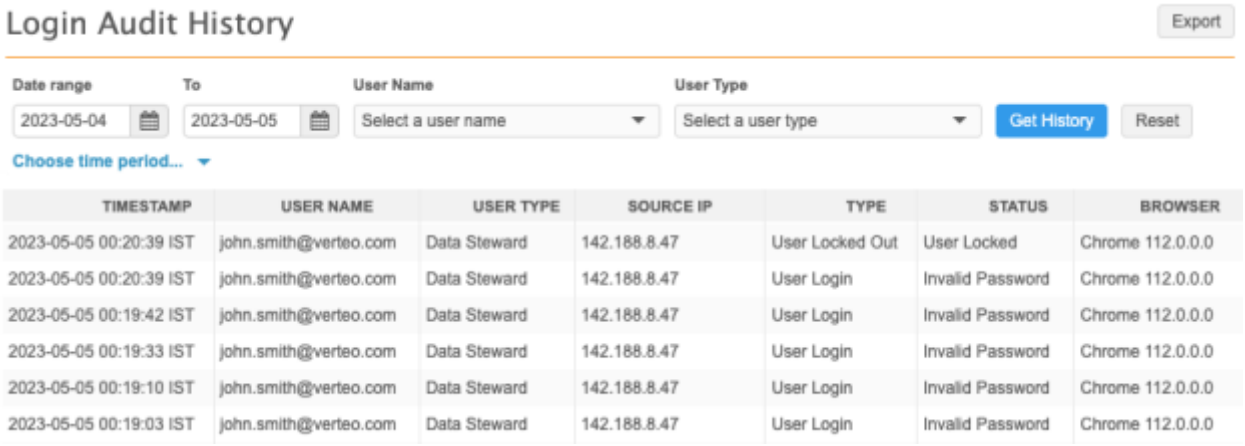
Users can click **Reset Password** to change their password and regain access to Network.

The link to reset the password can be used once and expires after 24 hours.

Tracking password management

Login Audit History

Administrators can view the Login Audit History to see when user has been locked out.

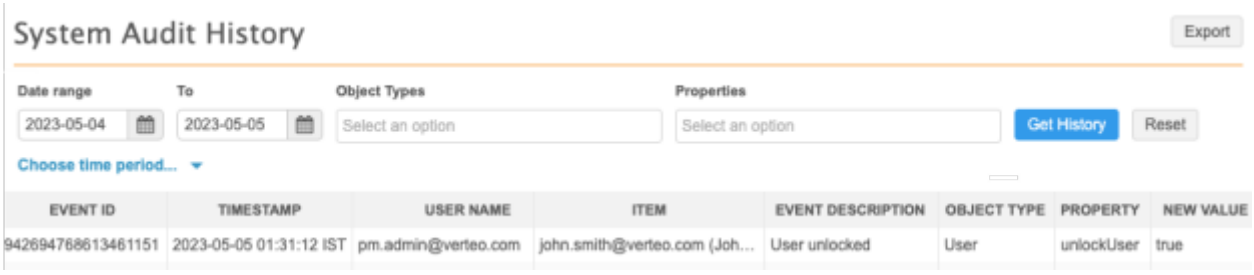


TIMESTAMP	USER NAME	USER TYPE	SOURCE IP	TYPE	STATUS	BROWSER
2023-05-05 00:20:39 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Locked Out	User Locked	Chrome 112.0.0.0
2023-05-05 00:20:39 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:42 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:33 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:10 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Login	Invalid Password	Chrome 112.0.0.0
2023-05-05 00:19:03 IST	john.smith@verteo.com	Data Steward	142.188.8.47	User Login	Invalid Password	Chrome 112.0.0.0

System Audit History

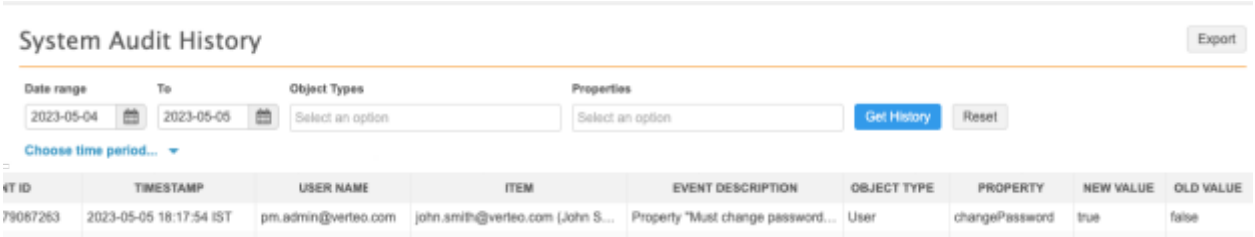
The System Audit History tracks the user who unlocked the user or reset the password.

Unlock



EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE
942694768613461151	2023-05-05 01:31:12 IST	pm.admin@verteo.com	john.smith@verteo.com (Joh...	User unlocked	User	unlockUser	true

Password reset



...T ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE	OLD VALUE
79087263	2023-05-05 18:17:54 IST	pm.admin@verteo.com	john.smith@verteo.com (John S...	Property "Must change password...	User	changePassword	true	false

Network integrations

HASHTAGS IN VEEVA CRM

Network hashtags are stored in the **Account Identifier** field by default in Veeva CRM. If you already have data in that field, you can choose to store hashtags in an alternate .

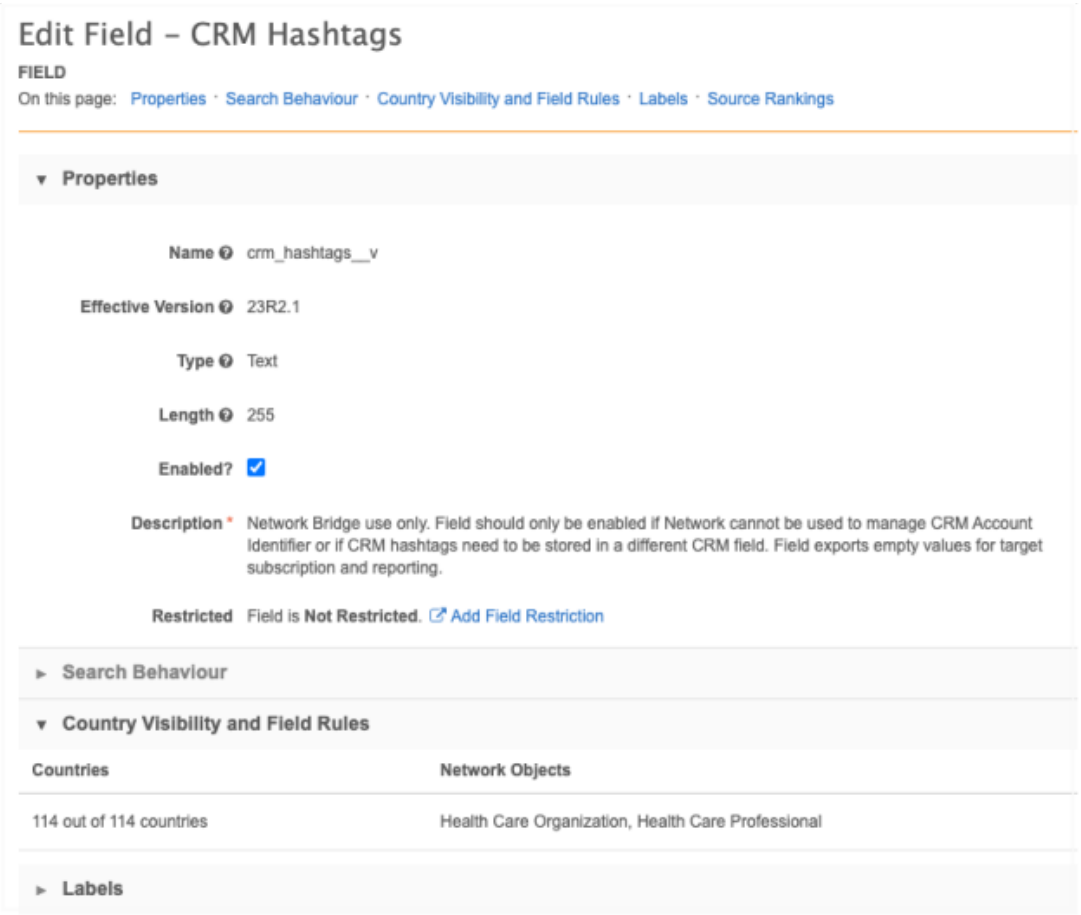
To support an alternate field for hashtags in CRM, Network has a new field called CRM Hashtags (`crm_hashtags__v`). You can map this Network field to your custom field in CRM. When the Network Bridge runs, hashtags are calculated in the Network field and are pushed to CRM to display in the custom field.

This feature is disabled by default. To enable it for your Network instance, contact Veeva Support.

Field details

When the feature is enabled in your Network instance, the **CRM Hashtags** field is available for HCP and HCO objects (**Data Model**). The field is read-only; it cannot be edited by submitting a data change request.

The field value is empty in target subscriptions and throughout the Network application (for example, Network Reporting) because hashtags are dynamically calculated.



Veeva CRM configuration

To use the `crm_hashtags__v` field, configure CRM to accept the field from the Network Bridge.

The following configuration is required in Veeva CRM:

- **Field mapping** - Map the crm_hashtags __v field between CRM and Network.

CRM Field API Name	Network Field API Name
Network_Hashtags__c	crm_hashtags__v

For details, see Network field mapping in the *Veeva CRM Online Help*.

- **Network Managed Account Identifier** Network Setting- The setting value must be set to `1` or `2`.

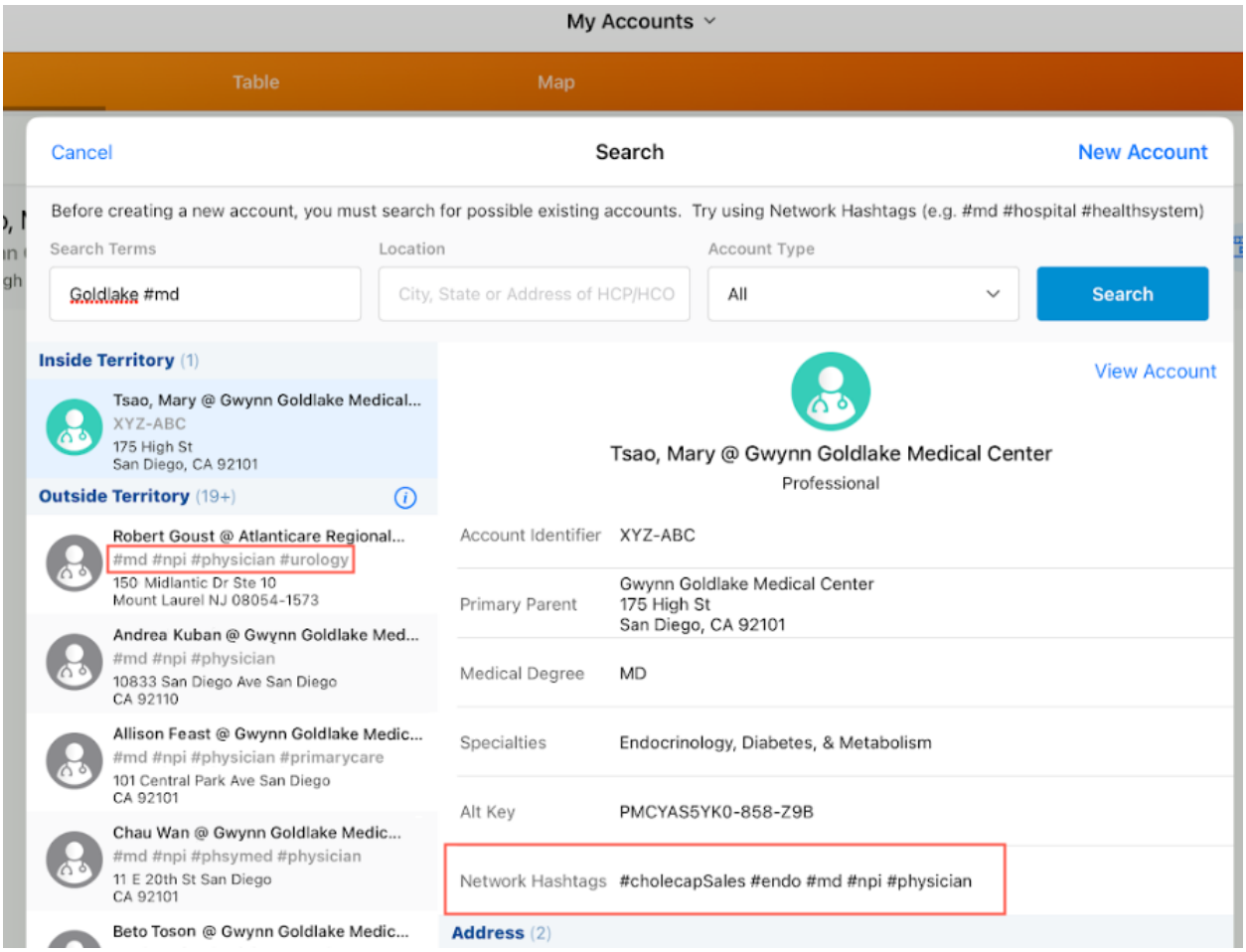
Setting value *1*

If the **Network Managed Account Identifier** Network Setting is set to `1`, only the alternate field, `Network_hashtags__c` is populated with hashtags in CRM.

Veeva ID field	Network_hashtags__c
942356340136150623	#md #npi #physician #salesdata #targetAllergy #targetOncology #targetNeurology #targetUrology
942356333379585631	#nurse

Example – Hashtags in Network Account Search

Hashtags display in the custom field on the account. In the **Outside Territory** search results, the hashtags display in the **Account Identifier** only for the UI.



Setting value *2*

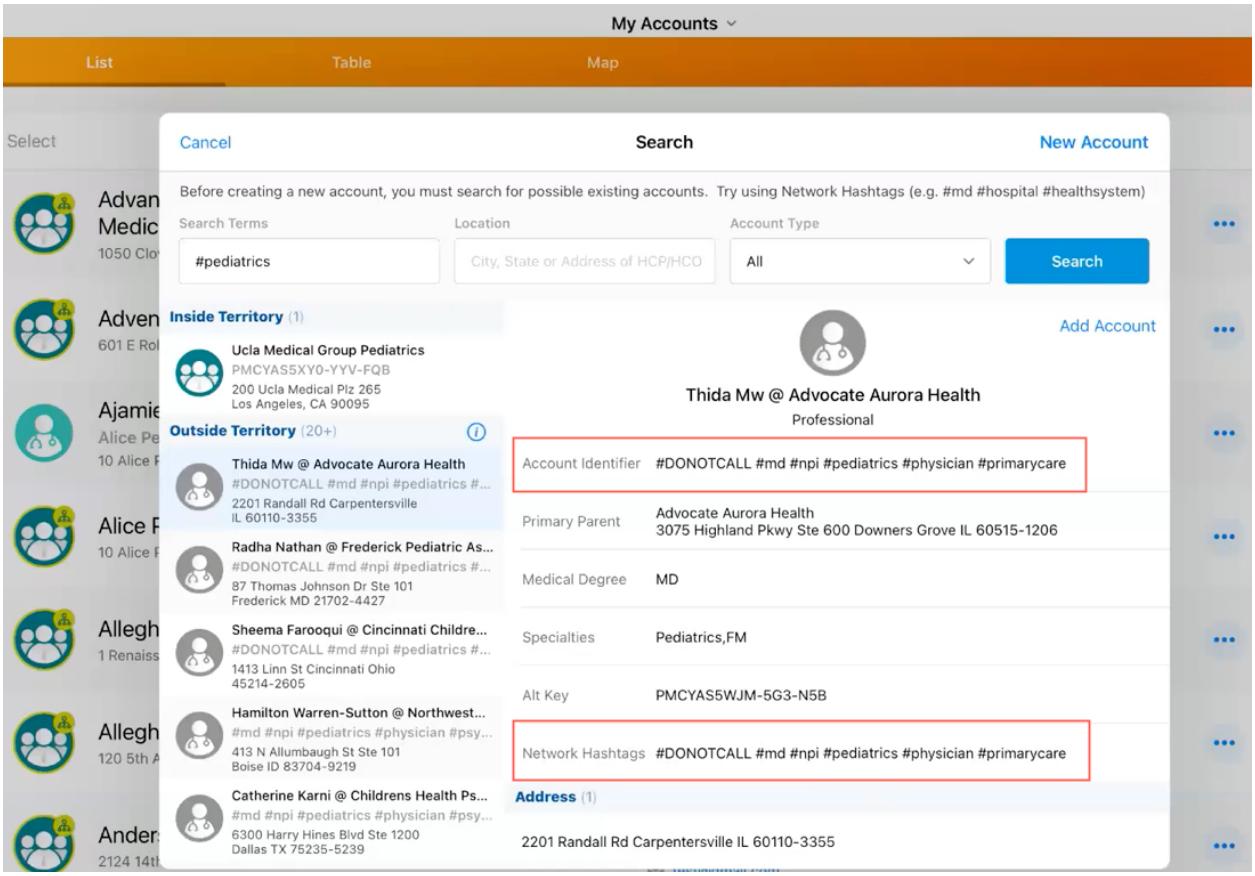
If the **Network Managed Account Identifier** Network Setting is set to `2`, the Account_Identifier_vod__c field and the alternate field, `Network_hashtags__c` are populated with hashtags in CRM.

Note: There is no maximum length for Network_hashtags__c field so additional hashtags might display.

Veeva ID field	Account_Identifier_vod__c (max length: 80)	Network_hashtags__c
942356340136150623	#md #npi #physician #salesdata #targetAllergy #targetOncology #targetNeurology	#md #npi #physician #salesdata #targetAllergy #targetOncology #targetNeurology #targetUrology
942356333379585631	#nurse	#nurse

Example – Hashtags in Network Account Search

Hashtags display in the **Account Identifier** field and the custom field for **Outside Territory** results.



For details about this setting, see Network hashtags in CRM in the *Veeva CRM Online Help*.

Network Bridge

When the Network Bridge runs, it validates that the `crm_hashtags__v` field is enabled in Network and that the CRM configuration is complete to determine if the hashtag values should be updated in CRM.

The field is supported for:

- CRM Windows
- CRM Online
- CRM for iPad

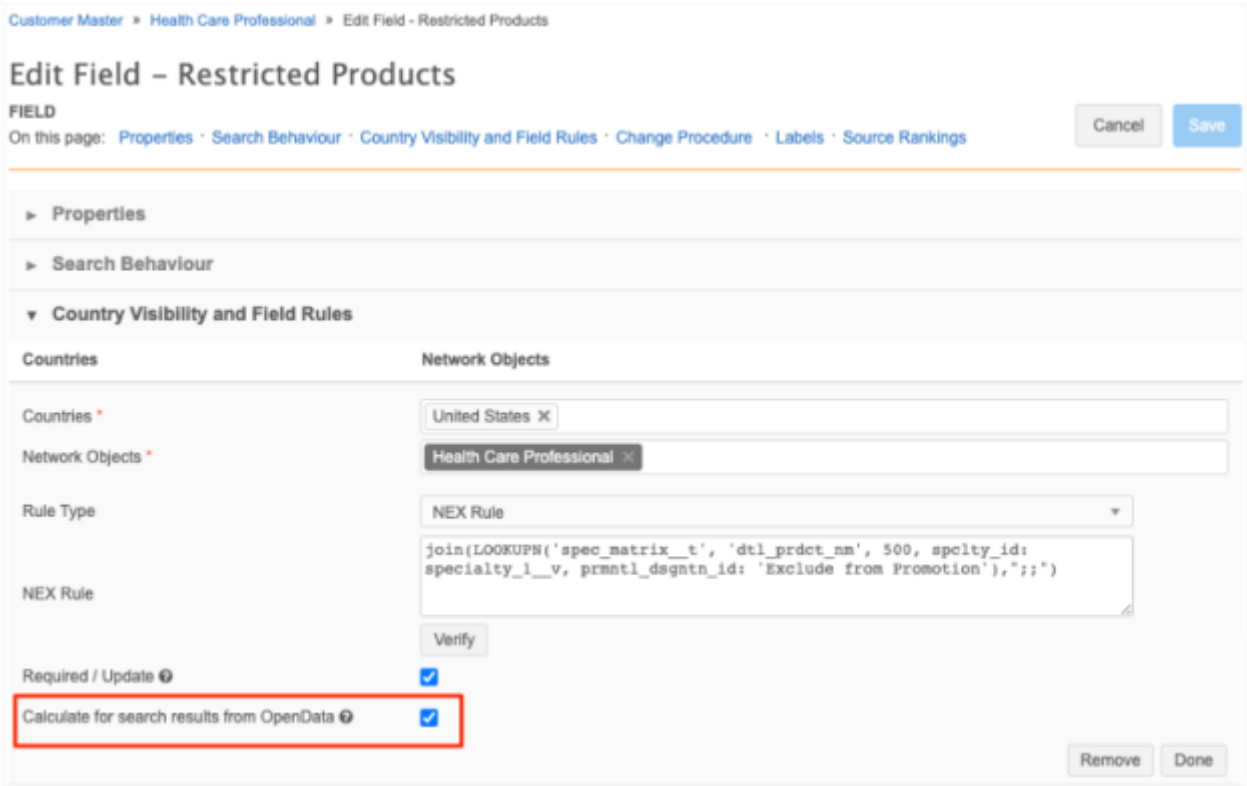
API

CUSTOM FIELDS IN OPENDATA SEARCH RESULTS

Custom fields that contain default or calculated values can now display in the Search API for OpenData search results.

Custom fields can be created to store calculated (formula) fields in Network. For example, you can use a lookup table in a NEX rule to populate restricted products into a custom field. These fields can use OpenData values as part of the formula, however, custom fields do not display in search results for records still in the OpenData instance.

Administrators can use a new setting on custom fields to display the default or calculated field values on search results to help end users select the relevant entity to download in Veeva CRM.



This enhancement is not available by default. To enable it for your Network instance, contact Veeva Support.

After the enhancement is enabled, Administrators and Data Managers can enable the setting on custom fields.

Note: This setting displays default or calculated fields on search results for Veeva OpenData records in the Search API and in Veeva CRM.
It does not display the field values when you are previewing OpenData records to download in the Network UI or in Network Widgets.

Enable the field setting

The **Calculate for search results from OpenData** setting is available on custom fields for all Veeva standard objects.

To enable the setting:

1. Open a custom field (**Data Model**) on a Veeva object.

   Note: This setting is not supported for the following custom field types: Primary (Network Calculated or Unique Checkbox) and Alternate Key.

2. In the **Country Visibility and Field Rules** section, select the **Calculate for search results from OpenData** setting.

   The setting is available for NEX Rule and Default Value rule types.

   Support for NEX rule expressions include Lookup functions.

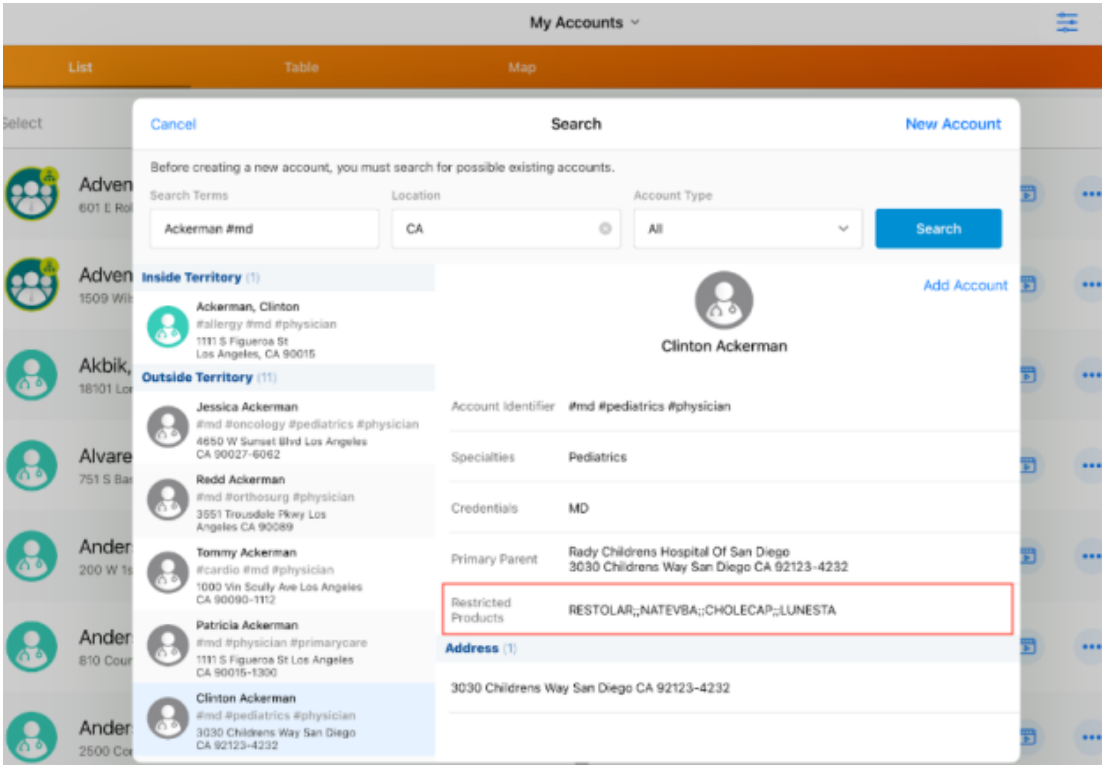
3. Save your changes.

When you search for a record, the field with the default or calculated (NEX rule) value displays on OpenData records that have not yet been downloaded to your Network instance.

Important: The default or calculated value cannot be used to filter for records in Veeva OpenData. The values are calculated for search results only.

Example

When a sales rep searches for an HCP in Veeva CRM, the **Restricted Products** custom field displays with the calculated value so the rep can decide if they should download the record from OpenData.



Search API

When Integration Users search for records, custom fields with the **Calculate for search results from OpenData** setting enabled will display the default or NEX rule calculated value in the Search API response.

Example response

The **Calculate for search results from OpenData** setting is indicated by the **resultIsFromMaster** value.


```
{
    "responseStatus": "SUCCESS",
    "entities": [
        {
            "entityId": "942733982759126623",
            "entityType": "HCP",
            "metaData": {
                "highlights": {...},
                "vid__v": "942733982759126623",
                "canDownloadFromMaster": true,
                "highlightTerms": [...],
                "resultIsFromMaster": true,
                "fromMasterInstance": 301,
                "relevance": 122.82719
            },
            "entity": {
                "gender__v": "M",
                "specialty_1__v": "PD",

                "hcp_type__v": "P",
                "first_name__v": "Clinton",
                "master_vid__v": "942733982759126623",
                "record_owner_type__v": "VOD",
                "record_delta_id__v": "942733982817222655",
                "last_name__v": "Ackerman",
                "record_owner_name__v": "OpenData",
                "medical_degree_1__v": "MD",
                "kaiser__v": "N",
                "formatted_name__v": "Clinton Ackerman",
                "primary_country__v": "US",
                "restricted_products__c": "RESTOLAR;;NATEVBA;;CHOLECAP;;LUNESTA",
                "hcp_status__v": "A",
                "vid__v": "942733982759126623",
                "is_externally_mastered__v": false,
                "specialty_1_rank__v": 1,
                "created_date__v": "2023-05-11T15:43:53.000-07:00",
                "pdrp_optout__v": "N",
                "is_veeva_master__v": true,
```

MATCH API

Reference value labels and reference aliases are now supported in Match API results.

API version

The parameters are supported for Network API version 29. If the parameters are used in earlier API versions, they are ignored.

Parameters

New optional parameters:

- `enrichedResults` - Specifies whether or not to display labels for reference type fields in the results.
- `resultLanguage` - Specifies the language to use if the enriched results option is enabled. Uses the IETF BCP 47 language standard.
- `systemName` - When provided, Network returns target alias values defined for reference codes for this system. Otherwise, Network returns default reference code values.

Display reference value labels

Use the following parameters to display the reference value labels in the Match API:

- `enrichedResults`
- `resultLanguage`

Example request

Return reference value labels in English (en).

```
POST
https://{{DNS}}/api/{{version}}/match/?enrichedResults=true&resultLanguage=
en
```

Note: Language labels are indicated by `value__u` fields.

Example response


```
{
     "responseStatus": "SUCCESS",
     "results": {
         "matchSetup": {...},
         "sourceEntity": {...},
         "matchedEntities": [
             {
                 "metaData": {...},
                 "matchResult": {...},
                 "entityType": "HCP",
                 "entityId": "940676573928359999",
                 "entity": {
                     "addresses__v": [
                         {
                             "address_line_1__v": "7777 Southwest Fwy Ste
540",
                             "locality__v": "Houston",
                             "premise__v": "7777",
                             "thoroughfare__v": "Southwest Fwy",
                             "administrative_area__v": "US-TX",
                             "administrative_area__v_value__u": "Texas",
                         }
                     ],
                     "email_1__v": "cooper.lopez@gmail.com",
                     "vid__v": "940676573928359999",
                     "first_name__v": "Cooper",
                     "last_name__v": "Lopez",
                     "specialty_1__v": "GS",
                     "specialty_1__v_value__u": "General Surgery",
                     "primary_specialty_group__v": "G-SURG",
                     "primary_specialty_group__v_value__u": "Surgery",
                     "medical_degree_1__v": "MD",
                     "medical_degree_1__v_value__u": "Doctor of Medicine",
                     ...
                 }
             },
             ...
         ]
     }
 }
```

Display reference alias names of reference values

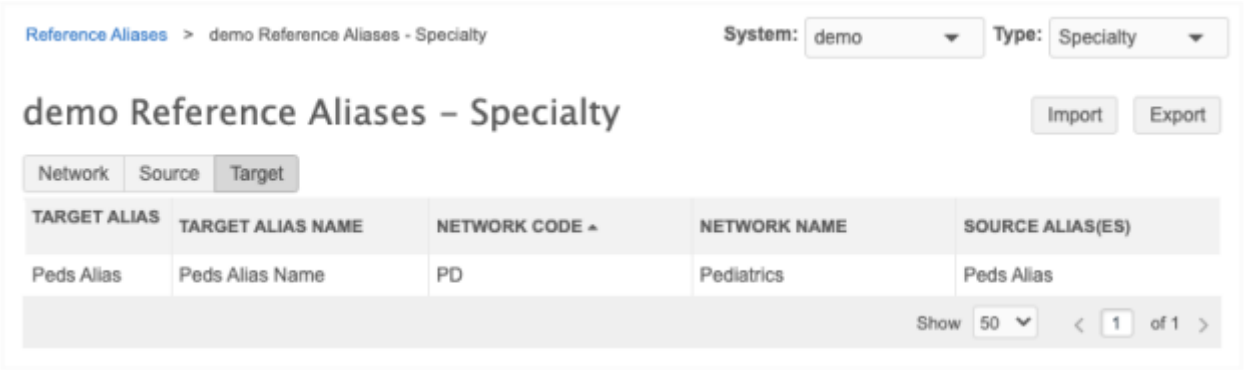
Use the following parameters to display the reference value labels in the Match API:

- `systemName`
- `enrichedResults`

Reference aliases

Reference aliases can be defined in **System Interfaces > Reference Aliases** for any source system defined in your Network instance.

Example reference alias



Example request

Return the target alias names from the system called *demo*.

```
POST
https://{{DNS}}/api/{{version}}/match/?enrichedResults=true&systemName=demo
```

Note: Target system alias names are indicated by `value__u` fields.

Example response


```
{
     "responseStatus": "SUCCESS",
     "results": {
         "matchSetup": {...},
         "sourceEntity": {...},
         "matchedEntities": [
             {
                 "metaData": {...},
                 "matchResult": {...},
                 "entityType": "HCP",
                 "entityId": "940676573928359519",
                 "entity": {
                     "addresses__v": [
                         {
                             "address_line_1__v": "7777 Southwest Fwy Ste
540",
                             "locality__v": "Houston",
                             "premise__v": "7777",
                             "thoroughfare__v": "Southwest Fwy",
                             "administrative_area__v": "US-TX",
                             "administrative_area__v_value__u": "Texas",
                         }
                     ],
                     "email_1__v": "astrid.gonzales@gmail.com",
                     "vid__v": "940676573928359519",
                     "first_name__v": "Astrid",
                     "last_name__v": "Gonzales",
                     "specialty_1__v": "Peds Alias",
                     "specialty_1__v_value__u": "Peds Alias Name",
                     "primary_specialty_group__v": "G-PD",
                     "primary_specialty_group__v_value__u": "Pediatrics",
                     "medical_degree_1__v": "MD",
                     "medical_degree_1__v_value__u": "Doctor of Medicine",
                     ...
                 }
             },
             ...
         ]
     }
 }
```

Display reference aliases

Use the following parameter to display the reference aliases for reference values in the Match API:

- `systemName`

Example request

Display reference aliases for the source system called *demo*.

```
POST https://{{DNS}}/api/{{version}}/match/?systemName=demo
```

Example response


```
{
     "responseStatus": "SUCCESS",
     "results": {
         "matchSetup": {...},
         "sourceEntity": {...},
         "matchedEntities": [
             {
                 "metaData": {...},
                 "matchResult": {...},
                 "entityType": "HCP",
                 "entityId": "940676573928359519",
                 "entity": {
                     "addresses__v": [
                         {
                             "address_line_1__v": "7777 Southwest Fwy Ste
540",
                             "locality__v": "Houston",
                             "premise__v": "7777",
                             "thoroughfare__v": "Southwest Fwy",
                             "administrative_area__v": "US-TX",
                         }
                     ],
                     "email_1__v": "astrid.gonzales@gmail.com",
                     "vid__v": "940676573928359519",
                     "first_name__v": "Astrid",
                     "last_name__v": "Gonzales",
                     "specialty_1__v": "Peds Alias",
                     "primary_specialty_group__v": "G-PD",
                     "medical_degree_1__v": "MD",
                     ...
                 }
             },
             ...
         ]
     }
 }
```

Submit reference aliases

Use the following parameter to submit a Match API request using source aliases:

- `systemName`

Example request

```
POST https://{{DNS}}/api/{{version}}/match/?systemName=demo
```

Example response

```
{
     "entity_type": "HCP",
     "entity": {
         "first_name__v": "Astrid",
         "last_name__v": "G",
         "primary_country__v": "US",
         "specialty_1__v": "Ped Alias"
         "addresses__v": [{
             "administrative_area__v" : "TX"
         }]
     }
 }
```