



Veeva Network

Veeva Network 24R2.0.1 Release Notes

August 2024



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About these Release Notes

These Release Notes describe all features that are included in Veeva Network 24R2.0.

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 supported on the latest version of these browsers, as of their most stable version at the time of release:

- Google Chrome™
- Apple® Safari®
- Microsoft® Edge

Veeva Network is not supported on mobile devices.



Release Note updates

The following features or enhancements have been added since the Sandbox Release Notes were published:

- **Authentication API update** – Starting in 25R1.0, Network will no longer support submitting credentials in the URL parameters in the Authentication API call.
- **Cluster management** - Updated cluster codes are available for Portugal from HMR™ and for Italy from IQVIA™.
- **Veeva CRM integration** - Sales reps can include images on data change requests submitted from CRM.

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 24R2.0 major release.

			ST	DS	DM	AD
Announcements						
API Authentication update	As of 25R1.0, Network will no longer support submitting credentials in the URL parameters in the Authentication API call.	25R1.0		Developers		
Deprecated features	The Data Migration, System Summary, and Merge Sync features have been removed from Network.	24R1.1	●	●	●	●
Common Data Architecture (CDA)						
About CDA in Network	CDA is standardized data components (entities, attributes, picklists) for life sciences organization.	24R2.0	●	●	●	●
CDA Fields	HCP and Address fields are added to the Network data model.	24R2.0	●	●	●	●
CDA Sync	CDA fields and mapped Veeva fields are synced to contain identical values.	24R2.0	●	●	●	●
CDA DCRs	Add and change requests can be submitted for CDA fields from Vault CRM and Network.	24R2.0	●	●	●	●
Network features for CDA	Features like record profiles and search support CDA fields.	24R2.0	●	●	●	●
My Request Widget						
Name change	The My Request widget is renamed to DCR Status widget.	24R2.0	●	●	●	●
DCR Status Widget						
Supported DCRs	Administrators can configure the widget to display DCRs submitted by other users.	24R2.0	●	●	●	●
Preset task filters	Add filters to the widget configuration so only specific tasks display to users.	24R2.0				●
View account DCRs	Widget developers can use the identifier parameter to configure the widget to display DCRs for the account opened in your app.	24R2.0		Widget developers		
Affiliation Widget						
Text setting	Administrators can control the ability to add text to the influence map canvas.	24R1.1	●	●	●	●



			ST	DS	DM	AD
Key Networks						
Search and profiles	Search results and record profiles are updated to display only the key network's alias and icon on affiliated HCPs and HCOs; the corporate name is removed.	24R1.1	●	●	●	●
Data Change Requests						
DCR attachments	Several enhancements have been added to support image attachments on DCRs.	24R1.1	●	●	●	●
OpenData DCRs	DCRs containing inactive or custom reference codes are no longer auto-rejected.	24R1.1	●	●	●	●
Data Components						
Vault data	Create data components to display data from Vault CRM.	24R2.0			●	●
Profiles						
Access profile layouts	Administrators and Data Managers can access the profile layout directly from the Profile page.	24R2.0	●	●	●	●
Matching						
Conditional matching	Subscription-level match filters can be applied to all match rules for an entity.	24R1.1			●	●
Match counts	Counts display on all tabs in the match configurations.	24R1.1			●	●
Filtering on individual match rules	A message displays to inform users that filters are supported for Direct Field match comparisons only.	24R1.1			●	●
Data Privacy						
HCP Opt Out (24R2.0)	OpenData now manages opt outs for Taiwan.	24R2.0		●	●	●
HCP Opt Out (24R1.1)	OpenData now manages opt outs for 23 countries in the Latin America region.	24R1.1		●	●	●
Data Model						
Cluster management	Updated cluster codes are available for Portugal from HMR and for Italy from IQVIA (Microbricks).	24R2.0			●	●
Multivalued fields	Data Managers can create reference type fields that support multiple values.	24R2.0			●	●
New language	Ukrainian (UK) is now supported for reference data.	24R1.1			●	●



			ST	DS	DM	AD
Cluster management	Updated cluster codes from IQVIA are available for Belgium, the Czech Republic, and Slovakia.	24R1.1			●	●
Primary custom fields	New primary fields support Unique Checkbox configurations only.	24R1.1			●	●
Custom Domains						
Global entities	Custom objects that do not have a primary country can be created.	24R1.1			●	●
Network expressions						
New functions	The SPLIT and GETOBJECTNAME functions are now supported in expressions.	24R2.0			●	●
NEX Tester	Enhancements include field validation and testing rules with sub-objects.	24R2.0			●	●
New operators	NEX rules now support UNION, UNION ALL, and INTERSECT operators.	24R1.1			●	●
Systems						
Viewing systems	The sort order on the Systems page is retained for each user.	24R1.1			●	●
Transformation Rules						
Network widget support	Transformation rules can now be used to transform data that is downloaded from the Search widget and Profile DCR widget.	24R1.1			●	●
Network API	Rules can be applied to the Search and Retrieve API for a system.	24R1.1			●	●
Exporting configurations	Transformation rules can be exported from source environments to target environments.	24R1.1				●
Veeva CRM						
DCR attachments	Sales reps can add attachments to DCRs submitted from CRM.	24R2.0			●	●
Vault CRM integration						
License DCRs	License data is mapped between Network License objects and Vault CRM license fields on Addresses.	24R2.0			●	●
Vault CRM Bridge	The Bridge now supports updating multiple object types in Vault CRM.	24R1.1			●	●
DCR enhancements	Administrators can monitor the status of DCR updates using the Task Audit Log.	24R1.1				●



		ST	DS	DM	AD
API					
Version update	The Network API is updated to v33.0.	22R2.0			Developers
Retrieve Field Details Metadata	This API call returns a new property to identify reference type fields that are multivalued.	22R2.0			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.



Announcements

API AUTHENTICATION UPDATE

As of the 25R1.0 release (January 2025), Network will no longer support submitting credentials in the URL parameters in the Authentication API call.

This update is being made to address security concerns. It was originally planned for Network 24R2.0 but has been extended to version 25R1.0.

Action

To gain access to your Network instance using the Network API, ensure that user names and passwords are submitted in the body of the POST request.

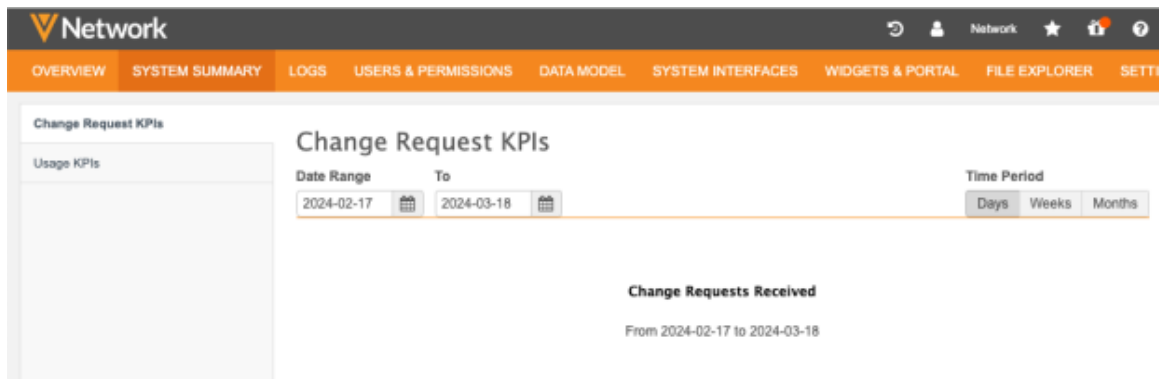
For details, see the [Authentication topic](#) in the *Veeva Network Developer Help*.

DEPRECATED FEATURES

24R1.1

The following features have been removed from the Network UI:

- **Data Migration** (System Interfaces)
- **System Summary** (Admin console) - This includes the Change Request KPIs and Usage KPIs pages.



- **Merge Sync** - (OpenData Subscriptions) This feature was available only for China.



Common Data Architecture for Life Sciences

The Common Data Architecture for Life Sciences (CDA) is a new industry standard for referring to HCPs, HCOs, clinical operations, and products and diseases. In this release, the HCP Kernel is supported.

All life sciences organizations can use CDA to communicate and collaborate more effectively with each other using these universal data components.

For more information about this open standard, see veeva.com/cda/.

KEY HIGHLIGHTS

- CDA is freely available for all life sciences organizations to implement and use.
- Vault CRM, Network, and OpenData are adopting the CDA HCP Kernel at the same time.
- The CDA HCP Kernel will contain the following components: entities (HCPs, Addresses), attributes, and picklists.

Note: The Segment object from the HCP CDA Kernel is not currently added to Network.

- For existing customers that integrate with Veeva CRM, there are no changes; CDA fields will be off by default.
- OpenData will provide values for most CDA fields on the HCP and Address objects on OpenData records.
- For locally managed (gray) records and third party managed records, Network provides the ability to calculate CDA fields based on the legacy fields.
- Data change requests can be submitted for CDA fields.

ABOUT THE CDA IN NETWORK

24R2

In Network version 24R2.0, the CDA HCP Kernel supports the following components:

- **Entity** - HCP
- **Attributes** - 50 new fields (HCP, Address). All fields contain the `__cda__v` suffix.
- **Picklists** - New reference types and reference codes. Multivalued reference fields are supported.

CDA fields

The CDA fields do not impact the legacy fields. In this release, many CDA field values may be calculated based on the existing legacy fields.

Field Name	Field Label	Field Type	Description
Veeva ID	veevaid__v	Text	Global identifier from Veeva data products
First Name (CDA)	first_name_cda__v	Text	Given name as officially recorded in professional or legal documents.



Field Name	Field Label	Field Type	Description
Last Name (CDA)	last_name_cda__v	Text	Family or surname as officially recorded in professional or legal documents.
Middle Name (CDA)	middle_name_cda__v	Text	Secondary given name or initial as officially recorded in professional or legal documents.
Prefix (CDA)	prefix_cda__v	Text	Salutation or title used before a person's name, such as Mr., Mrs., Dr., etc.
Suffix (CDA)	suffix__cda__v	Text	Includes professional credentials or generational titles such as I, II, III, IV, but excludes medical degrees.
Primary Language (CDA)	language_cda__v	Reference Type	Primary spoken and written language.
Primary Email (CDA)	email_cda__v	Text	Primary email address.
Mobile Phone (CDA)	mobile_phone_cda__v	Text	Primary mobile phone number. May include country code including non-alphanumeric characters. e.g. +, -
Office Phone (CDA)	office_phone_cda__v	Text	Primary office phone number. May include country code including non-alphanumeric characters. e.g. +, -
Fax (CDA)	fax_cda__v	Text	Primary fax. May include country code including non-alphanumeric characters. e.g. +, -
Country (CDA)	country_cda__v	Reference Type	Country from primary address.
State (CDA) (HCP field)	state_cda__v	Reference Type	State, province, or regional area from primary address.
City (CDA) (HCP field)	city_cda__v	Text	City or municipality from primary address.
Postal Code (CDA) (HCP field)	postal_code_cda__v	Text	Postal code from primary address. May include non-alphanumeric characters. e.g. -
Type (CDA)	hcp_type_cda__v	Reference Type	The role an individual plays in the life sciences industry, spanning from the development and commercialization of life science products to their delivery and administration in healthcare settings.
National Healthcare ID (CDA)	nhid_cda__v	Text	Unique identifier assigned to healthcare professionals within a country's healthcare system.



Field Name	Field Label	Field Type	Description
Primary Specialty (CDA)	spec_1_cda__v	Reference Type	The primary medical field or expertise area to which the healthcare professional belongs. Uses the list of specialties.
All Specialties (CDA)	all_spec_cda__v	Multivalued Reference Type	All medical fields and expertise areas to which the healthcare provider belongs. Uses the list of specialties.
Primary Specialty Group (CDA)	spec_group_1_cda__v	Reference Type	The primary overarching medical field or expertise area to which the healthcare provider belongs. Uses the list of global specialties.
All Specialty Groups (CDA)	all_spec_group_cda__v	Multivalued Reference Type	All overarching medical fields and expertise areas to which the healthcare provider belongs. Uses the list of global specialties.
Prescriber (CDA)	prescriber_cda__v	Boolean	Indicates whether the individual is authorized to prescribe medications.
Primary Medical Degree (CDA)	degree_1_cda__v	Reference Type	The primary medical qualification or degree obtained.
All Medical Degrees (CDA)	all_degree_cda__v	Multivalued Reference Type	Additional medical qualification or degree obtained.
Status (CDA)	status_cda__v	Reference Type	Indicates whether the healthcare professional is currently active and working or not.
Level	level_cda__v	Reference Type	Indicates the level of importance of this individual to the company, where level 5 indicates the highest level of importance. Can be used to drive business rules. For example: You may want to limit personalized promotions to levels 3 and below. You may also require a single relationship owner for level 5.
Adopter Type	adopter_type_cda__v	Reference Type	A categorization of the individual based on their willingness and speed to adopt new medical technologies, treatments, practices, or products.
Key Opinion Leader	kol_cda__v	Boolean	Recognized as a key opinion leader in the industry.
Investigator	investigator_cda__v	Boolean	Indicates whether the individual is involved in running clinical research studies.



Field Name	Field Label	Field Type	Description
Speaker	speaker_cda__v	Boolean	Indicates whether the individual is engaged in speaking roles at professional gatherings or educational events for the company.
Target	target_cda__v	Boolean	Indicates whether the individual is a target for one or more brands of the company.
Year of Birth (CDA)	year_of_birth_cda__v	Number	Birth year of the HCP.
Age Range (CDA)	age_range_cda__v	Reference Type	Age range of the HCP.
Street Address 1 (CDA)	street_address_1_cda__v	Text	Residential or business street address information including house number and street name.
Street Address 2 (CDA)	street_address_2_cda__v	Text	Additional address details, such as apartment, suite, or building number.
Country (CDA)	country_cda__v	Reference Type	Name of country.
State (CA) (Address field)	state_cda__v	Reference Type	Name of state, province, or regional area.
City (CDA) (Address field)	city_cda__v	Text	Name of city or municipality.
Postal Code (CDA) (Address field)	postal_code_cda__v	Text	May include non-alphanumeric characters.
Latitude (CDA)	latitude_cda__v	Number	Geographic coordinate specifying north-south position.
Longitude (CDA)	longitude_cda__v	Number	Geographic coordinate indicating east-west position.
Phone (CDA)	phone_cda__v	Text	Phone number. May include country code including non-alphanumeric characters. e.g. +, -
Fax (CDA)	fax_cda__v	Text	Fax number. May include country code including non-alphanumeric characters. e.g. +, -
Status (CDA)	status_cda__v		Indicates whether this address is currently usable for contact purposes.
Business (CDA)	business_cda__v	Boolean	Indicates whether this represents a business address.
Home	home_cda__v	Boolean	Indicates whether this represents a home address.
Billing	billing_cda__v	Boolean	Indicates whether this represents a billing address.
Shipping	shipping_cda__v	Boolean	Indicates whether this represents a shipping address.



Field Name	Field Label	Field Type	Description
Sample Shipping	sample_shipping_cda__v	Boolean	Indicates whether this represents a shipping address that can accept medical shipments.
Primary (CDA)	primary_cda__v	Boolean	Indicates whether this represents the individual's primary address. Only one address can be marked as Primary.

For more details, see the *CDA fields* section.

CDA Sync Calculation

Network will continue to support the existing data model and the new CDA data model. CDA Sync is a process that runs in the backend on your Network instance to calculate the values from the Veeva fields to the CDA fields.

For more details, see the *CDA Sync* section.

Vault CRM – Network integration

Vault CRM, Network, and OpenData are supporting the CDA HCP Kernel at the same time, so you can view and manage CDA fields between these applications.

Supported integration features

- Network Account Search
- Vault CRM Bridge
- Data change requests

More information about Vault CRM and CDA will be available in the Vault CRM 24R2.0 release.



Enable CDA in Network

New customers

Vault CRM, Network, and OpenData will begin supporting CDA in August 2024 with their respective releases.

CDA fields are enabled and implemented by default in new Network instances so new customers can use the standardized data structure for these applications from the start.

Existing customers

CDA fields will be available in existing instances, but they will not be enabled by default.

Administrators can enable CDA fields for their Network instance when they are ready to begin adopting this new standard.



To enable CDA for your existing Network instance:

1. In the Admin console, click **Settings > General Settings**.
2. Click **Edit**.
3. In the **Common Data Architecture (CDA) Data Model** section enable the following settings:
 - **Enable CDA Sync** - Sync calculated CDA fields with legacy fields in your Network instance.

This setting enables the CDA Sync Calculation and turns on the workflow process for the CDA data model.

Only impacts enabled CDA fields that are locally managed.

Note: This setting does not need to be enabled in your instance to get data from OpenData in CDA fields.

- **Enable CDA Data Model** - Enable all CDA data model fields.

This setting cannot be turned off after it has been enabled. Individual fields can be turned off in the data model.

4. **Save** your changes.



CDA DATA MODEL FIELDS

24R2

HCP and Address fields are currently supported for CDA. The naming convention for the fields contain the `_cda__v` suffix. The ID field (`veevaid__v`) is the exception to the naming convention.

Field ownership

Most of the new fields are managed by Veeva OpenData for OpenData records. The remaining fields are locally managed.

Field details

A list of the fields with high-level details are provided in the sections below.

For more information, see the [Common Data Architecture](#) topic in the *Veeva Network Online Help*. It contains a file (Calculation of CDA Fields <version_date>.xlsx) that you can download to explore the following details:

- Field ownership
- Field calculation rules for each country /region

CDA fields managed by OpenData

Veeva managed CDA field values will be pushed to your Network instance through your OpenData subscriptions or ad hoc downloads as usual.

Note: The **CDA Sync** setting does not need to be enabled in our Network instance to receive OpenData in these CDA fields.

HCP fields

Field Name	Label
veevaid__v	Veeva ID
first_name_cda__v	First Name (CDA)
last_name_cda__v	Last Name (CDA)
middle_name_cda__v	Middle Name (CDA)
prefix_cda__v	Prefix (CDA)
suffix__cda__v	Suffix (CDA)
language_cda__v	Primary Language (CDA)
email_cda__v	Primary Email (CDA)
mobile_phone_cda__v	Mobile Phone (CDA)
office_phone_cda__v	Office Phone (CDA)
fax_cda__v	Fax (CDA)



Field Name	Label
country_cda__v	Country (CDA)
hcp_type_cda__v	Type (CDA)
nhid_cda__v	National Healthcare ID (CDA)
spec_1_cda__v	Primary Specialty (CDA)
all_spec_cda__v	All Specialties (CDA)
spec_group_1_cda__v	Primary Specialty Group (CDA)
all_spec_group_cda__v	All Specialty Groups (CDA)
prescriber_cda__v	Prescriber (CDA)
degree_1_cda__v	Primary Medical Degree (CDA)
all_degree_cda__v	All Medical Degrees (CDA)
status_cda__v	Status (CDA)

Address fields

Field Name	Label
street_address_1_cda__v	Street Address 1 (CDA)
street_address_2_cda__v	Street Address 2 (CDA)
country_cda__v	Country (CDA)
state_cda__v	State (CA)
city_cda__v	City (CDA)
postal_code_cda__v	Postal Code (CDA)
latitude_cda__v	Latitude (CDA)
longitude_cda__v	Longitude (CDA)
phone_cda__v	Phone (CDA)
fax_cda__v	Fax (CDA)
status_cda__v	Status (CDA)
business_cda__v	Business (CDA)

Email field

You can subscribe to HCP email address data for supported OpenData countries.

The CDA email field, `email_cda__v`, is included with the legacy email fields (`email__1__v` to `email__10__v`) in these Email subscriptions.

To subscribe to HCP emails for a country, contact your Veeva representative.



Receive data in CDA fields from OpenData

After you enable at least one CDA field in your Network instance, run a full OpenData country subscription to update all records that are downloaded in your Network instance.

To run a full update:

1. Open an OpenData country subscription (**System Interfaces > OpenData Subscriptions**).
2. In the **Updates to OpenData records** section, select **Update all records**.
3. Save your changes.

The next time the subscription runs, you will receive updates for all the OpenData managed CDA fields that you have enabled.

Locally managed CDA fields

These CDA fields and their values are managed in your Network instance. These are custom fields, but they have the __v suffix.

HCP fields

Field Name	Label	Calculated?	Mapped Legacy Field
state_cda__v	State (CDA)	Yes	administrative_area__v
city_cda__v	City (CDA)	Yes	locality__v
postal_code_cda__v	Postal Code (CDA)	Yes	postal_code__v
level_cda__v	Level	No	No mapping
adopter_type_cda__v	Adopter Type	No	No mapping
kol_cda__v	Key Opinion Leader	No	No mapping
investigator_cda__v	Investigator	No	No mapping
speaker_cda__v	Speaker	No	No mapping
target_cda__v	Target	No	No mapping
year_of_birth_cda__v	Year of Birth (CDA)	No	No mapping
age_range_cda__v	Age Range (CDA)	No	No mapping

Address fields

Field Name	Label	Calculated?	Mapped Legacy Field
home_cda__v	Home	No	No mapping
billing_cda__v	Billing	No	No mapping
shipping_cda__v	Shipping	No	No mapping
sample_shipping_cda__v	Sample Shipping	No	No mapping
primary_cda__v	Primary (CDA)	No	No mapping



Primary CDA field

The `primary_cda__v` field flags an HCP's best address. Primary address fields contain several options for calculating the primary address. For the Primary CDA field, all options are selected so Network will recalculate the primary for the following conditions:

- The record does not have a primary address
- The current primary address is inactive.
- The current primary address is invalid or deleted.

These options ensure that when a new HCP record is downloaded, a primary address is defined. The options can be customized to meet your business needs.

Edit Field – Primary (CDA) ▾

FIELD

On this page: [Properties](#) · [Country Visibility and Field Rules](#) · [Change Procedure](#) · [Labels](#) · [Source Rankings](#)

▾ Properties

Name ⓘ `primary_cda__v`

Effective Version ⓘ 24R2

Type ⓘ Primary

Configuration ⓘ Unique Checkbox ▾

When to Calculate Primary Address

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

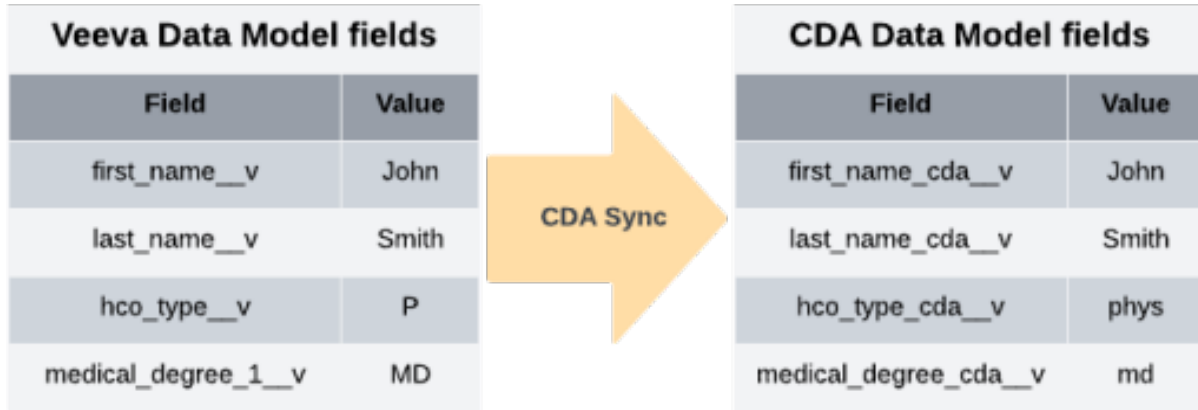
Calculated fields

Some locally managed fields are calculated fields. This means that the field values are populated by the CDA Sync process in your Network instance.

- `state_cda__v`
- `city_cda__v`
- `postal_code_cda__v`

CDA Sync applies to locally managed records only.

CDA Sync runs when data is updated in your Network instance, for example, through source subscriptions, data updater, DCRs, and merges. The process calculates the CDA field values using internal country-based rules or by mapping the corresponding legacy field value.



Note: CDA Sync must be enabled so calculated fields values can be populated.

Update fields

On locally managed records, calculated CDA fields are populated by the CDA Sync process.

The fields can be updated in the following ways:

- **Load data into the mapped legacy fields**

The CDA Sync process will map the values to the calculated CDA fields.

Important: If calculated CDA fields are included in the import files, the data will be overwritten when CDA Sync runs.

For more details, see the *CDA Sync* section.

- **Submit data change requests on calculated CDA fields**

The CDA Sync process will map the values to the legacy fields for Data Stewards to process.

For more details, see the *CDA DCRs* section.

Non-calculated fields

The CDA fields that are not calculated are managed just like legacy fields.

- level_cda__v
- adopter_type_cda__v
- kol_cda__v
- investigator_cda__v
- speaker_cda__v
- target_cda__v
- year_of_birth_cda__v
- age_range_cda__v
- home_cda__v
- billing_cda__v
- shipping_cda__v
- sample_shipping_cda__v
- primary_cda__v



Update fields

The fields can be updated in the following ways:

- **Submit data change requests on the non-calculated fields.**
- **Load the data into your Network instance**

Include non-calculated fields in the import files.

CDA picklists

Many of the CDA fields are reference type fields (picklists). New reference types have been added to Network to support the CDA fields.

Restricted picklists

Custom (customer owned) reference codes cannot be added to these picklists.

- AddressCountryCDA
- AddressStateCDA
- AdopterTypeCDA
- AgeRangeCDA
- HCPSpecialtyCDA
- HCPSpecialtyGroupCDA
- LanguageCDA
- LevelCDA
- StatusCDA

Unrestricted picklists

Custom reference codes can be added to these picklists

- HCPTTypeCDA
- HCPMedicalDegreeCDA

Reference codes

For more information, see the [Common Data Architecture](#) topic in the *Veeva Network Online Help*. It contains a file (Network CDA –Data dictionary <version_date>.xlsx) that you can download to explore the following details:

- Network > CDA language mappings
- Network > CDA reference code mappings

Administrators and Data Managers can also view the reference codes in the Network UI (**Data Model > Reference Data**).

Note: CDA reference codes are in lowercase, for example, dvm, dmd, md.

Multivalued reference types

Network supports multivalued reference types in version 24R2.0.

For details, see the "Multivalued Reference Fields" topic in these *Release Notes*.



CDA SYNC

24R2

The CDA Sync process adds values to the calculated CDA fields based on the mapped legacy fields values or using the internal Network rules defined for each country.

The process ensures that the Network and Vault CRM CDA data models are in sync to make integration seamless.

Enable CDA Sync

CDA sync is not enabled by default in Network instances.

- **New instances** - The CDA data model is enabled by default. To populate CDA field values, enable **CDA Sync**
- **Existing instances** - The CDA data model is off by default. When you enable all fields or individual fields, also enable **CDA Sync** so the field values are populated.

About CDA Sync

The CDA Sync process runs during data update jobs to map the legacy field values to calculated CDA fields.

CDA field calculations

CDA Sync rules use internal rules to map the values between the calculated CDA fields and the legacy fields.

There are default rules and rules for specific countries or regions. The rules might calculate the field values or map the value from the corresponding legacy field.

Example

CDA Field	US Mapping/Calculation Rule	EMEA Mapping/Calculation Rule
state__cda__v	Use administrative_area__v from the first address of the HCP record. First address: primary_cda__v = Y Reference code is lower cased	Use administrative_area__v from the first address of the HCP record. First address: primary_cda__v = Y Reference code is lower cased
city__cda__v	Use locality__v from the first address of the HCP record. First address: primary_cda__v = Y locality__v (First 40 characters)	Use locality__v from the first address of the HCP record. First address: primary_cda__v = Y locality__v (First 40 characters)
postal_code__cda__v	Use postal_code__v from the first address of the HCP record. First address: primary_cda__v = Y Use first 5 characters	Use postal_code__v from the first address of the HCP record. First address: primary_cda__v = Y Use first 20 characters



Supported jobs

CDA Sync runs last in any update job to ensure that all processes are complete (for example, merges and NEX rules) before the value is calculated. This way, the legacy fields and the CDA fields have the same values.

This includes the following jobs:

- Source subscription (including simulated jobs)
- Data updater
- Data maintenance jobs
- Merge
Winning and losing records are updated.
- Unmerge
New record and the existing record of the unmerge are updated
- Data change request
- OpenData subscription and ad hoc jobs
Local addresses and fields only. CDA fields that are managed by OpenData are pushed to your Network instances in the same way that legacy fields are.

After these jobs run, the CDA field values on the updated records will be calculated.

CDA Sync runs on active fields only. If the legacy field or CDA field is not active, a value will not be calculated.

Supported records and fields

CDA Sync runs in your Network instance on locally managed records.

It applies to calculated CDA fields that are locally managed. CDA Sync runs on active fields only. If the legacy field or the CDA field is not active, the CDA field value will not be calculated.



Third party records

Calculated CDA fields are populated by Network on third party records. The calculated CDA fields must be locally managed; they cannot be managed by third party data providers.

On a third party data source configuration (**Systems**), calculated CDA fields are dimmed in the **Available Fields** panel. They cannot be moved to the **Selected Fields** panel to be managed by the third party provider.



Backfill existing records

On existing locally managed records, CDA field values will be calculated when those records are touched or updated.



CDA DCRs

Add and change requests can be submitted for CDA fields from the following:

- Vault CRM
- Network UI
- Network API

Key highlights

There is minimal impact to local Data Stewards for DCR processing.

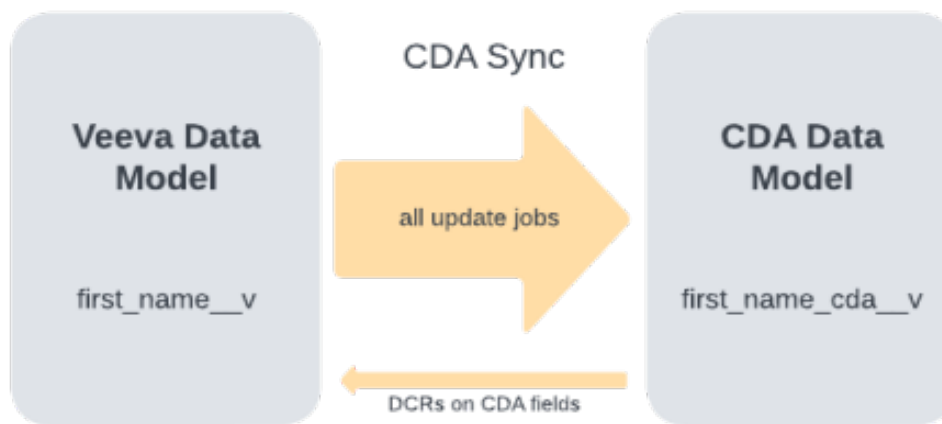
- Data Stewards will continue to process changes to the legacy fields; changes submitted to calculated CDA fields are mapped to the corresponding legacy field.
- Calculated CDA fields display as read-only on DCRs and are contained in the **CDA fields** section.
- Non-calculated CDA fields can be processed the same way as the legacy fields.

To understand how CDA fields are processed in DCRs, see the [Common Data Architecture](#) topic in the *Veeva Network Online Help*. It contains a file (CDA DCR Field Mappings <version_date>.xlsx) that you can download for more details.

Prerequisite

The **Enable CDA Sync** setting must be on so add requests on CDA fields can be processed.

CDA Sync will map the CDA fields to legacy fields.



If **Enable CDA Sync** is off, change requests on CDA fields will be processed without updating the legacy fields.



Processing DCRs

Data Stewards can continue to process the legacy fields and custom fields on DCRs.

The following behavior occurs on the DCR page:

Calculated CDA fields

- Changes submitted to calculated CDA fields are mapped to the legacy fields.
- Network adds the legacy fields to the DCR. They display as regular DCR fields.
- Data Stewards can accept, modify, or reject the changes on the legacy fields as usual.
- The calculated CDA fields that were submitted on the DCR display in a separate section with the message `Calculated Field` to indicate that no action is required.

Noncalculated CDA fields

- Display as regular DCR fields. Data Stewards can accept, modify, or reject the changes as usual.

Example DCR

On this add request, a user submitted the required values on the First Name CDA and Last Name CDA fields. The CDA field values are mapped to the legacy fields, so Data Stewards can process the changes on the legacy fields.

The screenshot shows the 'Add Request' interface. At the top right is a 'Re-assign' button. Below it are tabs for 'All Fields' and 'DCR Fields', along with 'Collapse All' and 'Expand All' buttons. A list of sections is shown, with 'CDA Fields' highlighted. The main table has two columns: 'Field' and 'Add Request'. Under 'Primary Information', there are rows for 'First Name *' (value: Richard) and 'Last Name *' (value: Tatter), each with a checkmark, an 'x' icon, and an edit icon. Under 'CDA Fields', there are rows for 'First Name (CDA)' (value: Richard) and 'Last Name (CDA)' (value: Tatter), both labeled as 'Calculated Field'.

Field	Add Request
Primary Information	
First Name *	Richard ✓ ✕ ✎
Last Name *	Tatter ✓ ✕ ✎
CDA Fields	
First Name (CDA)	Richard Calculated Field
Last Name (CDA)	Tatter Calculated Field

If Data Stewards change a value, the existing values on the DCR are not auto-calculated. The calculation occurs only when you click **Apply**.



DCRs for legacy fields

- If DCRs contain changes to legacy fields, the corresponding CDA fields do not display on the DCR page.
- DCR values on legacy fields are not overridden by CDA Sync. During the DCR process, CDA Sync will update the CDA field values to the legacy fields.

CDA fields not supported for DCRs

Some CDA fields are not supported for DCRs.

- **Multivalued reference fields**
DCRS for multivalued reference fields will be supported in a future release.
- **Read-only fields**
These field values are calculated from rules only.

The following fields are not supported.

Object	CDA Field	Reason
HCP	veevaid__v	Read-only system field
HCP	country_cda__v	Read-only system field for change_request
HCP	state_cda__v	Read-only system field
HCP	city_cda__v	Read-only system field
HCP	postal_code_cda__v	Read-only system field
HCP	all_spec_cda__v	Multivalued field
HCP	spec_group_1_cda__v	Multivalued field
HCP	all_spec_group_cda__v	Multivalued field
HCP	all_degree_cda__v	Multivalued field
Address	latitude_cda__v	Read-only system field
Address	longitude_cda__v	Read-only system field

Routing DCRs

The `hcp_type__v` field determines where DCRs are routed.

Considerations for custom HCP types

For add requests, if there is a custom HCP type on the legacy field that is not on the CDA field, the default HCP type will be used to route the DCR. For example, the default HCP type for US HCP records is Prescriber, so the DCR will be routed to Veeva OpenData.



Prefix field

The Prefix field is an exception to the way the other CDA fields are processed.

The `prefix_cda__v` CDA field is a text field, but the corresponding legacy field, `prefix__v`, is a reference type field.

If a DCR is submitted for the `prefix_cda__v` field, the text value is mapped to the `prefix__v` field. Data Stewards must change the text label to a supported reference code for the legacy field.

After the DCR is approved, the CDA Sync process will populate the `prefix_cda__v` field value for the translated label based on the record language.

Suspect Match

On Suspect Match tasks, Data Stewards will continue to process the legacy fields. Calculated CDA fields are mapped to the legacy fields, so they display in a separate section and they are read-only to avoid any duplication. This is the same behavior on DCR tasks.

CDA fields that are not calculated can be processed the same as the legacy fields.

Workflow settings

Workflow settings, for example, auto-approve add and change requests, are not supported for calculated CDA fields in this release.

Network API

The Change Request API and Retrieve Change Request API support CDA fields. Integration users can submit and retrieve DCRs on all CDA fields and legacy fields.

About the API response

When the DCR contains calculated CDA fields and CDA Sync maps the values to the legacy fields, the API records the legacy fields as a `CHANGE_ADDED`.

Note: The legacy fields display as normal requested fields on the DCR page for Data Stewards (Accept, Reject, Modify) regardless of the API field status.

When Data Stewards process the changes (add, modify, or reject), all calculated legacy fields have a status of `CHANGE_ADDED` in the API response unless the change is rejected.

- Accepted = `CHANGE_ADDED`
- Modified = `CHANGE_ADDED`
- Rejected = `CHANGE_REJECTED`

Rejected field changes are not returned in the task in the API.



NETWORK FEATURES FOR CDA

24R2

To support CDA, Network features are updated to include the CDA fields.

Record profiles

CDA fields display in the **CDA Fields** section on record profiles.

Daniel Dell ☆

#npi #pharmacist

FULL ADDRESS 625 N 6th St Phoenix AZ 85004-2155
Non-Prescribing Health Care Professional, Pharmaceutical Medicine

▼ CDA Fields

- Primary Information
- Addresses
- Parent Affiliations
- E-Contacts
- External Identifiers
- Licenses
- CMS Open Payments
- OIG LEIE Sanction 1
- OIG LEIE Sanction 2
- OIG LEIE Sanction 3
- Educational Information
- Personal Information
- EMR Information
- Custom Fields
- CDA Fields
- Record Information

<p>Prefix (CDA) ⓘ</p> <p>No Value</p> <p>Middle Name (CDA) ⓘ</p> <p>abc</p> <p>Suffix (CDA) ⓘ</p> <p>No Value</p> <p>Prescriber (CDA) ⓘ</p> <p>No/False</p> <p>Primary Language (CDA) ⓘ</p> <p>English</p> <p>Office Phone (CDA) ⓘ</p> <p>6024058222</p> <p>City (CDA) ⓘ</p> <p>Phoenix</p> <p>Country (CDA) ⓘ</p> <p>United States of America</p> <p>Primary Speciality (CDA) ⓘ</p> <p>Pharmacy Speciality</p> <p>Primary Speciality Group (CDA) ⓘ</p> <p>Pharmacy Speciality</p>	<p>First Name (CDA) ⓘ</p> <p>Danielle</p> <p>Last Name (CDA) ⓘ</p> <p>Keller</p> <p>Type (CDA) ⓘ</p> <p>Pharmacist</p> <p>National Healthcare ID (CDA) ⓘ</p> <p>1326470238</p> <p>Primary Email (CDA) ⓘ</p> <p>Danielle.keller@dignityhealth.org</p> <p>Fax (CDA) ⓘ</p> <p>No Value</p> <p>State (CDA) ⓘ</p> <p>Arizona</p> <p>Postal Code (CDA) ⓘ</p> <p>85004</p> <p>All Specialities (CDA) ⓘ</p> <p>Infectious Diseases Obesity Medicine Genetics Pharmacy Speciality 🔒</p> <p>All Specialty Groups (CDA) ⓘ</p> <p>Infectious Diseases Endocrinology Genetics Pharmacy Speciality 🔒</p>	
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Profile layouts

Enabled CDA fields are added by default to all standard profile layouts except JPStandard and CNStandard layouts.

Most of the fields are in the **CDA Fields** section, but some CDA Address fields are added to the **Addresses** section.

The screenshot displays the configuration for the 'NASTandard (Read Only)' profile layout. At the top, it identifies the layout as a 'Standard US Template for HCPs' created by the system, used by 2 Data Visibility Profiles and 0 Widgets. Below this, a 'READ ONLY' status is indicated. A search bar labeled 'Search fields...' is present. The main section is titled 'CDA Fields' and contains a list of ten fields, each with a dropdown arrow icon:

- Prefix (CDA)
- First Name (CDA)
- Middle Name (CDA)
- Last Name (CDA)
- Suffix (CDA)
- Type (CDA)
- Prescriber (CDA)
- National Healthcare ID (CDA)
- Primary Language (CDA)
- Primary Email (CDA)

Note: CDA fields are read-only on Profiles in this release.

Network search

All enabled CDA fields are supported for search. This includes Advanced Search, Search API, and Search against OpenData.



Data lineage

CDA field updates are identified as **Calculated Value** in the **Current Source** column on the Data Lineage page.

Recent » CM-86694-HCP One CM-86694-TEN-TEN I » Data Lineage

Field	Current Source	Network
<input type="text" value="Jump to a section"/>		
		CM-86
		94423292
Birth Year	customer	1972
Birth City	customer	TRAVIS A
Birth State	customer	California
Birth Country	customer	United Sta
Custom Fields		
emails_cda	Calculated Value ⓘ	emails.test
first_name_cda	Calculated Value ⓘ	CM-86694
specialties_cda	Calculated Value ⓘ	CIP,ch,Du,
specialty_cda	Calculated Value ⓘ	Multi Spec
VeevalD_cda	Calculated Value ⓘ	V0094423

Rule "Common Data Architecture" calculated the field during the job [240](#).

Match considerations

The default match rules are not being updated for this release. During the matching process, the legacy fields (__v) will continue to be used for matching.

Administrators can choose to use CDA fields in match rules. Ensure the CDA fields are consistently populated first.



Network Address Inheritance

CDA address fields can be copied from a parent address to a child address on locally managed records.

Note: CDA address fields that are calculated by CDA Sync are not copied during the address inheritance process.

On the Network Address Inheritance page (**Data Model > Network Address Inheritance**), you can choose the CDA address fields to copy from the parent's address.

In the **Address Fields Sync** section, only the non-calculated CDA fields display in the **Available Fields** column.

The screenshot shows the 'ADDRESS FIELDS SYNC' interface. It consists of two main panels: 'Available Columns' on the left and 'Selected Columns' on the right. The 'Available Columns' panel lists various fields, with 'Billing (billing_cda__v)' highlighted in a red box. The 'Selected Columns' panel lists fields that have been moved from the available list. Navigation arrows are located between the two panels.

Available Columns	Selected Columns
Address Delivery Type (record_type__v)	Address Line 1 (address_line_1__v)
Address Line 2 (address_line_2__v)	Address Type (address_type__v)
Address Line 3 (address_line_3__v)	Address Verification Status (address_verific...
Billing (billing_cda__v)	City (locality__v)
Building (building__v)	Country (country__v)
Building Leading Type (building_leading_ty...	Premise (premise__v)
Building Name (building_name__v)	Premise Number (premise_number__v)
Building Trailing Type (building_trailing_type...	Primary Zip/Postal Code (postal_code_prim...
CBSA (cbsa__v)	State/Province (administrative_area__v)
Congressional District (congressional_distri...	Status (address_status__v)

For example, you can move the `billing_cda__v` field to the **Selected Columns** panel so the value is copied from the parent address to the related child address.



My Request widget

NAME CHANGE

24R2

The **My Request** widget is renamed to **DCR Status** widget to more accurately identify its new capability to show the DCR status for multiple users.

The name change does not impact existing My Request widgets.

This update is enabled by default in your Network instance.

Widget configuration

The updated widget name displays when you create a new widget.

The **New Network Widget** dialog is updated to display **DCR Status Widget** instead of **My Request Widget**.

On new DCR Status widgets and existing My Request widget configurations, the **Type** label is updated to **DCR Status Widget**.



Widget code

To support existing My Request widgets, the code that is generated for the DCR Status widget configuration will continue to use the `myrequests` name.

Generate Code

Step 1: Include this code in your HTML. Copy Code to Clipboard

```
<script type="text/javascript" src="https://sandboxwidgets.veevanetwork.com/veeva-network-manifest.js"></script>
<script type="text/javascript" src="https://sandboxwidgets.veevanetwork.com/veeva-network-myrequests-widget-loader.js"></script>
```

Step 2: Include this code in the body of your HTML. Copy Code to Clipboard

```
<veeva-network-myrequests-widget
  widget-name="myRequest"
  auth-domain="verteo.veevanetwork.com"
  widget-id="MzA30zs7bXlyZXF1ZXN0X19j">
</veeva-network-myrequests-widget>
```

For more information, please refer to the [documentation for developers](#).

Done

DCR Status widget

The DCR Status widget was previously called the My Requests widget.

The following enhancements are included in this release.

- View DCRs submitted by other users
- Configure preset task filters
- Use the `identifier` property in your custom application to view all DCRs for specific accounts

These enhancements are available by default. They can be enabled by Administrators in the widget configuration and widget developers for your custom applications. There is no impact to existing My Request widgets.

For details, see the sections below.

Integration benefits

When you are integrating the widget in your custom application, these enhancements can help you to sync the DCRs between Network and your downstream system. This process is typically difficult because the data frequently changes and the data volume can be high. Using these enhancements, you can configure the DCR Status widget to display all DCRs for a selected account when it is opened in your custom application. There's no longer a need to copy the data back and forth between systems.



SUPPORTED DCRs

24R2

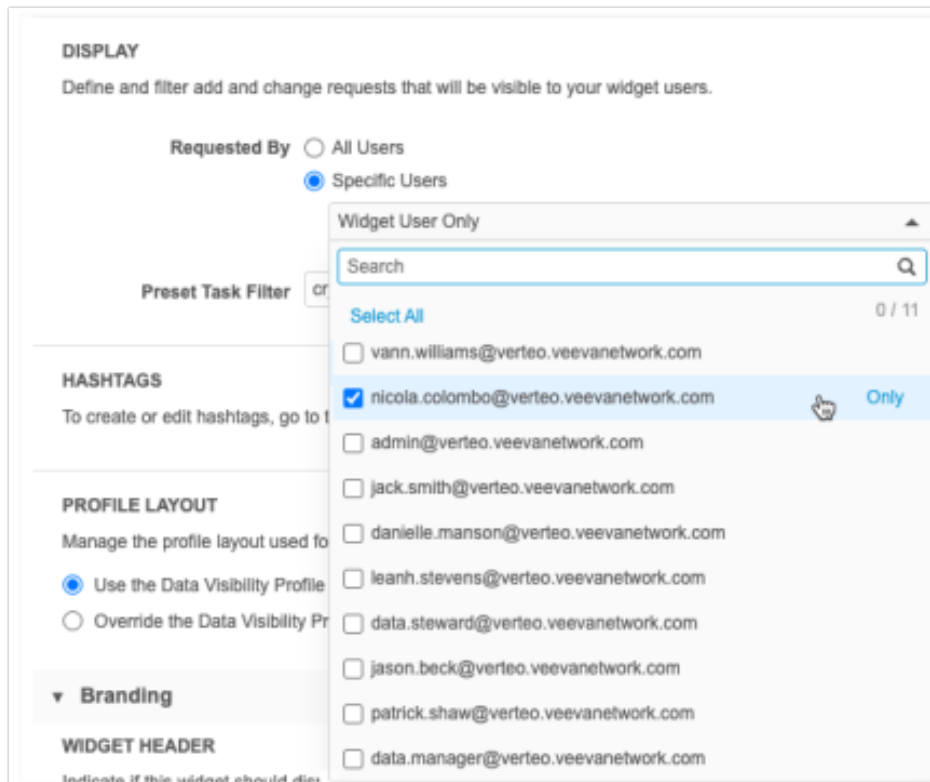
The DCR Status widget (*previously called My Request widget*) supports viewing DCRs submitted by other users. Previously, you could view only the DCRs that you submitted.

DCR Status						
Search requests...		All Types	All Statuses	Requester	Sort by Date	
NAME	TYPE	REQUESTER COMMENTS	REQUESTER	SUBMIT DATE	STATUS	
John Murphy	Change	New address - HCP moved	nicola.colombo@verteo.veevanetwork.com	June 28, 2024	Pending Review	
Nigel Adams	Change		patrick.shaw@verteo.veevanetwork.com	May 2, 2024	Rejected	
Amy English	Change		vann.williams@verteo.veevanetwork.com	May 2, 2024	Pending Review	
Harry Chow	Change	DEA license	nicola.colombo@verteo.veevanetwork.com	May 2, 2024	Accepted	

This enhancement is available by default in your Network instance. The option to include DCRs from other users must be set in the widget configuration.

Define users

Administrators can configure the widget to display DCRs submitted by other users.





To include additional users:

1. Open the widget configuration (**Widgets & Portal > Network Widgets**).
2. In the **Display** section, use the **Requested By** list to include additional users.
 - **All Users** - Select to include all current users and new users that will be added to the list.
 - **Specific Users** - Expand the list to choose individual users. Only active users display in the list.

By default, this option is set to **Widget User Only** for new and existing widgets

Use **Select All** to choose all current users. This option does not automatically include new users that are added to Network.

If additional users are defined, the widget is updated to include the **Requester** column. The Network user name displays in the column. The **Requester** filter is also added so you can filter the widget to view tasks submitted by specific users.

NAME	TYPE	REQUESTER COMMENTS	REQUESTER	SUBMIT DATE	STATUS
John Murphy	Change	New address - HCP moved	nicola.colombo@verteo.veevanetwork.com	June 28, 2024	Pending Review
Nigel Adams	Change		patrick.shaw@verteo.veevanetwork.com	May 2, 2024	Rejected
Amy English	Change		vann.williams@verteo.veevanetwork.com	May 2, 2024	Pending Review
Harry Chow	Change	DEA license	nicola.colombo@verteo.veevanetwork.com	May 2, 2024	Accepted

PRESET TASK FILTERS

24R2

Administrators can define preset filters in the DCR Status widget configuration. For example, you can configure the widget to only display only specific tasks.

In the **Display** section, add a filter to the **Preset Task Filter** setting.

Example – One filter

To configure the widget to display DCRs that have been rejected, set the following filter:

```
cr_status:REJECTED
```

Widget users will only see tasks that have been rejected.



Example - Multiple filters

Use the Tilde (~) symbol to combine filters.

To configure the widget to display tasks from a specific system that are waiting to be reviewed, set the following filter:

```
cr_status:PENDINGREVIEW~system:EngagementPortal
```

Widget users will only see pending tasks that were submitted from their Engagement Portal.

Supported filters and values

- **task_type** - ADD_REQUEST or CHANGE REQUEST
- **task_status** - NEW, IN_PROGRESS, CLOSED
- **task_country** - Country to which the task belongs (for example, US)
- **resolution** - CHANGE_PENDING, CHANGE_ACCEPTED, CHANGE_REJECTED, CHANGE_PARTIAL
- **created_at** - Date the task was created (for example, 2024-07-24)
- **cr_status** - REJECTED, PENDINGREVIEW, ACCEPTED, PARTIALLYACCEPTED
- **creator** - Name of the user that submitted the task
- **completed_at** - Completed date of the task (for example, 2024-07-24)
- **completed_by** - The ID of the user that approved the task
- **system** - The name of the system that generated the task
- **entity_type** - HCP or HCO
- **owner** - ID of the task owner

VIEW DCRs ON INDIVIDUAL ACCOUNTS

24R2

Users can view all DCRs from individual accounts in your internal application. For example, if you open the DCR Status widget from an account page in your internal application, all DCRs that have been submitted for that account display in the widget.

Widget developers can add the `identifier` property to the DCR Status widget code to display the DCRs from an account page.

Example

```
<veeva-network-myrequests-widget
  widget-name="DCRStatus"
  auth-domain="verteo.veevanetwork.com"
  widget-id="MzA3Ozs7bXlyZXF1ZXN0X19j"
  identifier="89755468556789410">
</veeva-network-myrequests-widget>
```

When the DCR Status widget is embedded in an internal application and a user opens it from an account, the DCRs that have been submitted for that account will display.



DCR Status					
944951434919413362		All Types	All Statuses	Requester	
NAME	TYPE	REQUESTER COMMENTS	REQUESTER	SUBMIT DATE	STATUS
Guy Grade	Change		admin@p1.vardas.com	June 6, 2024	Pending Review
Guy Grade	Change		admin@p1.vardas.com	June 6, 2024	Accepted
Guy Grade	Change		admin@p1.vardas.com	June 6, 2024	Pending Review
Guy Grade	Change		Integration user@p1.vardas.com	June 6, 2024	Pending Review
Guy Grade	Change	t	Integration user@p1.vardas.com	June 6, 2024	Rejected
Guy Grade	Change		Integration user@p1.vardas.com	June 6, 2024	Accepted
Guy Grade	Change	Email Specialty	Integration user@p1.vardas.com	June 6, 2024	Accepted

Displaying 1 - 9 of 9 Results

Show 10 < 1 / 1 >

For details about embedding widgets and adding properties, see the [Network Widgets](#) topics in the *Network Developers Online Help*.

Affiliation widget

TEXT SETTING

24R1.1

Administrators can choose to allow users to add text to the Influence Map. A new setting, **Add Text**, is added to the Affiliation widget configuration.

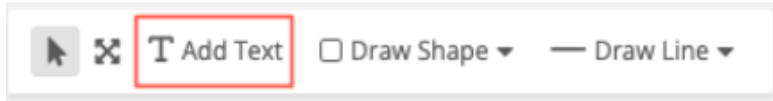
By default, the **Add Text** setting is on.

ADD TEXT TO CANVAS

Indicate whether users should be allowed to add text to the influence map canvas.

Add Text Allow users to add text to the canvas

If Administrators turn off the **Add Text** setting, any current text remains on the influence map but users will no longer be able to add text. The **Add Text** option will be hidden on the **Edit Canvas** toolbar on the Influence Map.



This enhancement is enabled by default in your Network instance.

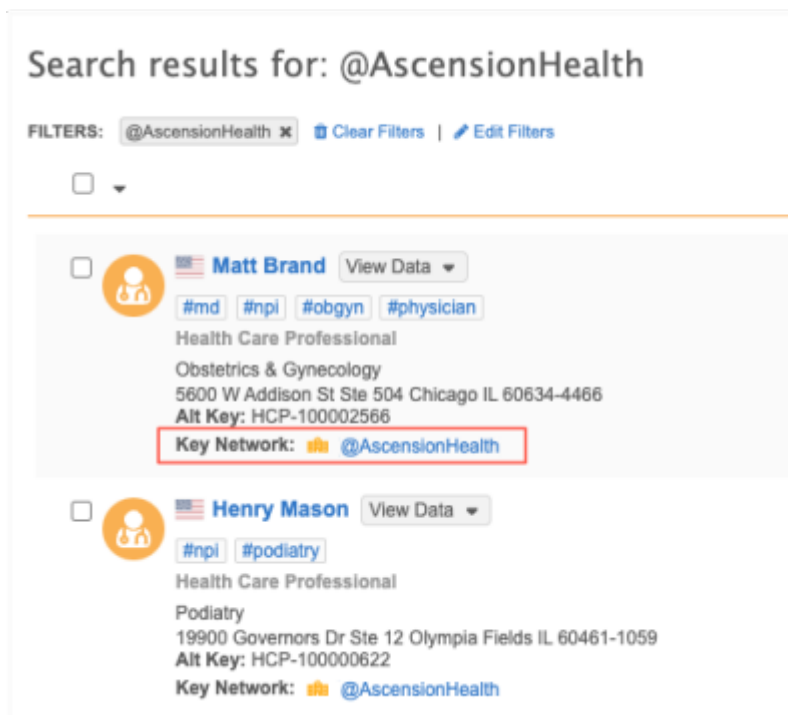
Key networks

SEARCH AND PROFILES

24R1.1

Search results and record profiles are updated to display only the alias (for example, @AscensionHealth) and icon of the key network on affiliated HCPs and HCOs. Previously, the corporate name also displayed.

This change reduces the details users need to scan on the search results and provides additional room to display more key networks if they exist for a record.



This enhancement is enabled by default in your Network instance. Searching for key networks is supported for US and UK OpenData records by default.

For details about this feature, see [Key HCO network search](#) in the *Veeva Network Online Help*.



Data change requests

DCR ATTACHMENTS

24R1.1

Attachments can be added to add and change requests to provide supporting information or evidence that Data Stewards can use to quickly validate the requests.

In this release, the enhancements have been added to support users that submit data change requests (DCRs) and for Data Stewards that process the requests.

Enhancements for users submitting DCRs

- Support increase in maximum file size
- Support for more detailed image captions
- General guidelines for safe DCR attachments

Enhancements for Data Stewards

- Support for previewing .heif/.heic images on browsers
- Previewing captions and images

Most of these enhancements are enabled by default in your Network instance. To increase the file size supported for attachments, contact Veeva Support.

Maximum file size

The maximum supported image size is 10MB per image by default for all Network instances.

To increase the maximum attachment file size for your Network instance, contact Veeva Support.

Image captions

Users can provide supporting details when they include attachments on DCRs. These details display as captions on DCRs. Captions can now support a maximum of 1000 characters so users can include additional details. Previously, the limit was 255 characters.



Apply Add Request


Notes

New doctor

Attachments

You are about to upload an attachment to support a Data Change Request. By uploading, you confirm that the attachment contains HCO/ HCP contact details that you collected from publicly available or accessible sources. Only image file types will be accepted. Images shall not contain people or any offensive content.

Attach up to 3 photos to your change request. File size limit: 20MB per file

 **CPSO_Anna_Garcia.png** 15 MB

Screenshot of CPSO online file to help validate the details for Dr. Garcia. Prefers visits in afternoons. No hours on Fridays and Tuesday mornings. Dr. Garcia's admin is Dan Greenly.

General guidelines for safe DCR attachments

The **Apply Add Request** dialog is updated to include guidance for images that can be attached to DCRs.

Ensure that attachments follow these guidelines:

- Contain contact details from publicly available and accessible sources
- Do not contain pictures of people
- Do not contain offensive content



Apply Add Request

Notes

Attachments

You are about to upload an attachment to support a Data Change Request. By uploading, you confirm that the attachment contains HCO/ HCP contact details that you collected from publicly available or accessible sources. Only image file types will be accepted. Images shall not contain people or any offensive content.

Attach up to 3 photos to your change request. File size limit: 20MB per file

Browse Files

Cancel Apply

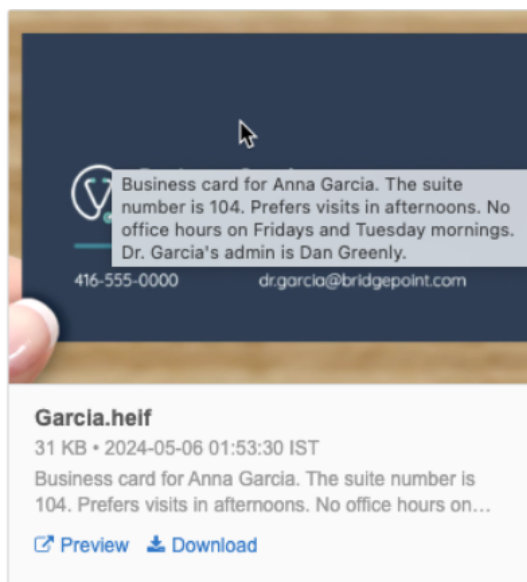
Support for HEIF image files

Network users can now preview .heif and .heic files that are a maximum of 8MB when they are processing DCRs on the browser. Previously, .heif and .heic image attachments had to be downloaded from the **Attachments** tab and then viewed in another application.

Note: When users attach .heif and .heic files from the Profile page, a thumbnail image does not display

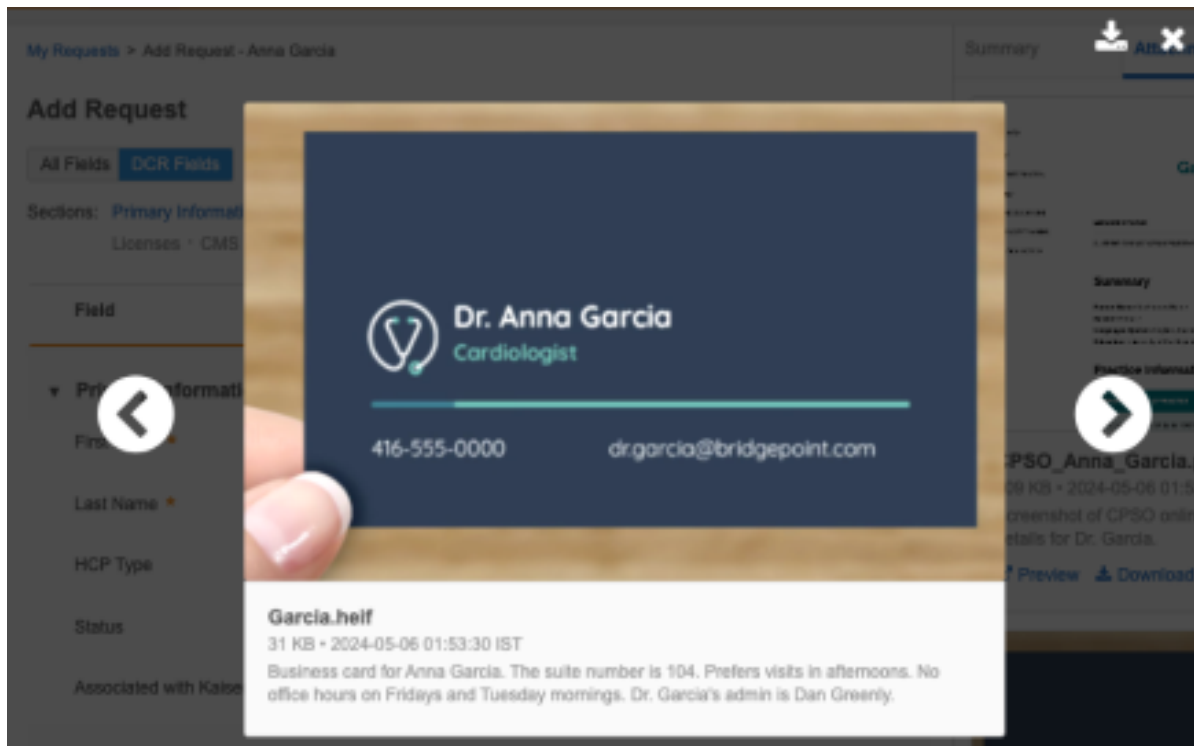
Preview captions and images

When Data Stewards hover over an image on the **Attachments** tab on the DCR, the full image caption now displays.





Data Stewards can now click the image on the **Attachments** tab to quickly open the preview.



The full caption displays on the image preview.

OPENDATA DCRs

24R1.1

Data change requests (DCRs) on Veeva OpenData records are no longer automatically rejected if they contain inactive or custom reference codes.

DCRs are now routed to OpenData data stewards to review. Data Stewards can edit the request and replace the reference code with a code that is active for that OpenData country.

This enhancement is enabled by default in your Network instance.



Data components

VAULT DATA

24R2

Data components can display data from Vault (including Vault CRM). When you open the data component, the data from Vault is dynamically retrieved and displayed for the record that you are viewing in the Network UI.

This enhancement is enabled by default in your Network instance.

Profile Details | **Vault CRM EU** | **Vault CRM US**

Address

ID	ADDRESS VID	ADDRESS LINE 1	CITY	STATE	ZIP CODE	PRIMARY	INACTIVE	SAMPLE STATUS	LICENSE NUMBER	DEA NUMBER
V5600000017363	243335665729658103	4 Bay St	Sacramento	ca_v	95617-2229	false	false	Invalid	A119106	FC3240936
V5600000017364	9334068938915408736	55 Ranch Dr	Rocklin	ca_v	95765-5397	true	false	Invalid	A119106	

Calls

CALL DATE	ADDRESS	CALL TYPE
2024-06-05	550 W Ranch View Dr Ste 2005, Rocklin, CA 95765-5397 US	detail_only_v

Emails

CREATED DATE	EMAIL SENT DATE	ACCOUNT EMAIL	EMAIL SOURCE	STATUS	FAILURE MESSAGE	OPENED
2024-06-11T19:06:06.000Z	2023-09-04T18:00:00.000Z			active_v		0
2024-06-11T19:06:06.000Z		hchow@gmail.com	Account.PersonEmail	active_v	Unable to process email in 14 days	0
2024-06-11T19:06:06.000Z	2024-01-17T19:56:48.000Z	John.Smith@gmail.com	Account.PersonEmail	active_v		0
2024-06-11T19:06:06.000Z		Anumpa.Pakoor@gmail.com	Account.PersonEmail	active_v		0
2024-06-11T19:06:06.000Z		Elizabeth.Walts@gmail.com	Account.PersonEmail	active_v		0
2024-06-11T19:06:06.000Z		Ajay.Krisna@gmail.com	Account.PersonEmail	active_v		0
2024-06-11T19:06:06.000Z		Suzanne.Lite@gmail.com	Account.PersonEmail	active_v		1
2024-06-11T19:06:06.000Z		Maria.Colombo@gmail.com	Account.PersonEmail	active_v	Email address in 'From Address' is not valid.	0

Territory

TERRITORY NAME	TERRITORY DESCRIPTION	MANUAL	RULE BASED	CREATED DATE
101	MA	true	false	2024-07-01T19:05:18.000Z
102	NH	true	false	2024-07-01T19:05:26.000Z

Vault data component support

Vault data can display in the following areas in the Network UI:

- Profile page
- Add requests and change requests
- Search results (**View Data** menu)



Search results for: ascension Add Record

FILTERS: Entity Type: Health Care Organization Clear Filters | Edit Filters

Displaying 1 to 20 of 1,911 (0 Selected)

Ascension Health
#crm #healthsystem
 Unspecified specialty
 101 S Hanley Rd Ste 450 S
HCO Type: Organization, H
URL 1: http://ascension.org

Our Lady Of The Lake
#hospital #medicare #
 Multi Specialty Practice
 1125 W Highway 30 Gonzal
HCO Type: Organization, H
URL 1: https://ololrnc.com/

Our Lady Of Lake
#groupPractice #npi #
 Primary Care Practice

View Data ▾

- Open Profile
- Add to Starred
- Copy Veeva ID to clipboard
- Hierarchy Records**
- Direct Child Records
- Parent Records
- Data Reports**
- Vault CRM US
- Child HCO Counts

Create a Vault data component

Administrators and Data Managers can add data components to display specific data from Vault.

1. In the Admin console, click **Widgets & Portal > Data Components**.
2. Click **Add Data Component**.
3. In the New Data Component popup, select **Vault**.

Click **Add Data Component**.

4. 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. Vault is the type by default.
- 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 Vault that you want to connect to retrieve the data.

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

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

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

▼ Permissions

Define where the component is displayed, countries, entities, and user groups that apply.

Display in Profiles
 Network Profile and DCR Pages

Country of the record All Countries
 Selected Countries
3 items selected

Entities

User Groups All Users Except Integration Users
 Specific User Groups

Select which user groups you want to give access to the data component, or [create a new group here](#).

Search selected user groups ...

<input type="checkbox"/>	GROUP NAME	DESCRIPTION	TYPE	ACTIVE USERS	STATUS
<input type="checkbox"/>	Data Managers	All active users with the data manager user type.	System Managed Group	2	Active
<input type="checkbox"/>	Data Stewards	All active users with the data steward user type.	System Managed Group	3	Active
<input type="checkbox"/>	Standard Users	All active users with the standard user type.	System Managed Group	0	Active
<input type="checkbox"/>	System Admins	All active users with the system admin user type.	System Managed Group	4	Active
<input type="checkbox"/>	System and Data Admins	All active users with the system and data admin user type.	System Managed Group	1	Active

Displaying 1 to 5 of 5

Show 25 of 1 of 1

- a. **Display in** - Choose where to display the data component.
 - **Profiles** (default) - The data component will display in the Network UI on record profiles, add and change requests, and in search results (**View Data** menu).



The results that display for each data component query are based on the following settings:

b. **Country of the record**

- **All Countries** (default) - All countries that you have set up in your Network instance.
- **Selected Countries** - 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.

c. **Entities** - By default, **HCP** is defined. Click the field to add entities.

Veeva standard objects and custom objects are supported for the Network UI.

d. **User Groups** - Define the users that can access the data component.

- **All Users Except Integration Users** (default).
- **Specific User Groups** - Choose to enable the option to define different groups.

6. In the **Component Builder** section, use a VQL query to retrieve specific data from Vault.

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

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





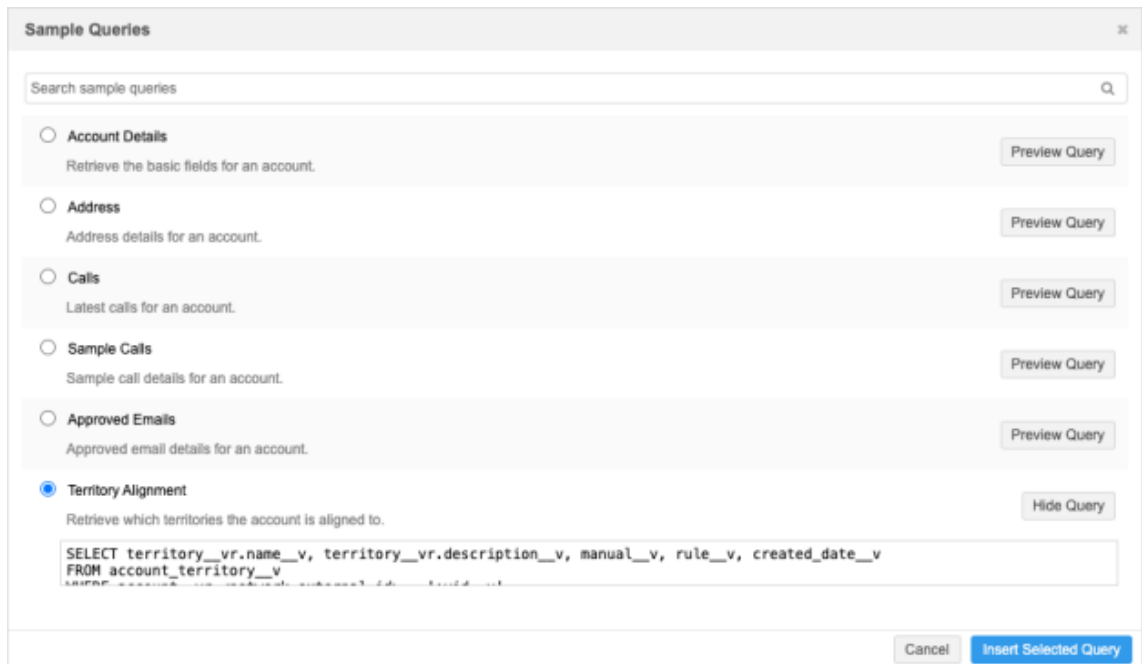
To define a query:

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

Note: See the "Sample Queries" section below for queries that you can use.

If you click **Sample Queries**:

- In the **Sample Queries** dialog, select a query; for example, the **Territory Alignment** query so users can view the territories 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 Vault object.

- **Placeholders**

Some sample queries have a placeholder for a field enclosed in angle brackets (<>). Replace it with the appropriate Vault field.

Example

Replace <network_external_id> with the Vault field that contains the Veeva ID: veeva_network__id__v.

- **VID variable**

The Network field vid__v is included in the queries as a dynamic variable (:vid__v). When the data component is opened on a profile, the variable is swapped with the Veeva ID of that record.



- b. In the **Section Name** field, type a name for this data; for example, *Addresses*. This name will be the heading in the data component.
- 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 the **Details View** and the query returns more than one result, only the first result will display.
- **Table View** - Use when you expect to return multiple results for an account. For example, address data or call data for an HCP.

Example

In this example, the **Account** section uses the **Details view**. The **Address** section uses the **Table View**.

The screenshot shows a user profile for Harbir Hales. The profile includes fields for Name, Email, Specialty, and Do Not Call. Below the profile details is an 'Address' section containing a table with columns: ID, ADDRESS VID, ADDRESS LINE 1, CITY, STATE, ZIP CODE, PRIMARY, INACTIVE, SAMPLE STATUS, LICENSE NUMBER, and DEA NUMBER. The table lists three address records for Sacramento, CA.

ID	ADDRESS VID	ADDRESS LINE 1	CITY	STATE	ZIP CODE	PRIMARY	INACTIVE	SAMPLE STATUS	LICENSE NUMBER	DEA NUMBER
V5600000017383	24333566572968103	4 Bay St Ste 3016	Sacramento	ca_v	95817-2229	false	false	Invalid	A119106	FC3245936
V5600000017384	933408938915408736	550 Branch Dr	Rocklin	ca_v	95765-5387	true	false	Invalid	A119106	
V5600000017385	936239443629882033	20 4th St	Sacramento	ca_v	95817-1514	false	false	Invalid	A119106	
V5600000017386	936825558319303521	4 Bay St Fl 2	Sacramento	ca_v	95817-2229	false	false	Invalid	A119106	

- 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 VQL query.

- e. Click **Test Query** to preview the results to ensure that this is the data you want to retrieve from Vault.

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 use a Veeva ID for a record in Spain but your data visibility profile permissions only include France and Germany, a permission error displays.



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.

Test Query: Address

Hide Query Details ▾



```
SELECT id, veeva_network_id__v, name__v, city__v, state_province__v, zip__v, primary__v, inactive__v, sample_status__v, license__v, dea__v
FROM address__v
WHERE account__vr.veeva_network_id__v = '243195409537696769'
```

ID	Address VID	Address Line 1	City	State
V5600000000P001	828533240556659200	4302 S Sugar Rd Ste 201	Edinburg	Tx__v
V5600000000P002	243367428875093002	1309 E Nolana Ave Ste C	Mcallen	Tx__v
V5600000000P003	932772691138513759	244 Lindberg Ave	Mcallen	Tx__v
V5600000000P004	939085117890628451	1518 W Fern Ave	Mcallen	Tx__v
V5600000000P005	934075270778129278	1601 Karria Ave	Mcallen	Tx__v








Cancel Save

Tip: You can edit the headers. Saving the changes updates the **Headers** field in the section.

Close the dialog to continue.

7. To add more sections, click **Add Section**.
8. In the **Reorder Sections** pane, all sections that you have defined are listed.
 - Use the **Handle**  icon to move the section to a different position in the **Data Component**.
 - Use the **Delete**  icon to remove the section from the data component.

Reorder Sections

-  Account
-  Address
-  Calls
-  Emails  
-  Territory

9. 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 use 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.

Data Component ✕

Vault CRM US

Address

ID	ADDRESS ID	ADDRESS LINE 1	CITY	STATE	ZIP CODE	PRIMARY	INACTIVE	SAMPLE STATUS	LICENSE NUMBER	DEA NUMBER
V560000000P001	828533245559659200	4302 S Sugar Rd Ste 201	Edinburg	tx_v	78539-9140	false	false	Invalid	M1875	
V560000000P002	243367428875093002	1309 E Noliana Ave Ste C	Mcallen	tx_v	78504-6190	false	false	Invalid	M1875	
V560000000P003	932772691138513759	244 Lindberg Ave	Mcallen	tx_v	78501-2920	true	false	Invalid	M1875	BL7933410
V560000000P004	939085117890628451	1518 W Fern Ave	Mcallen	tx_v	78501-3210	false	false	Invalid	M1875	
V560000000P005	934075270778129278	1601 Kerita Ave	Mcallen	tx_v	78501-3836	false	false	Invalid	M1875	

Calls

CALL DATE	ADDRESS	CALL TYPE
2024-04-17	244 Lindberg Ave, Mcallen, TX 78501 US	call_only_v
2024-04-01	244 Lindberg Ave, Mcallen, TX 78501 US	call_only_v
2024-04-01	244 Lindberg Ave, Mcallen, TX 78501 US	call_only_v
2024-03-29	244 Lindberg Ave, Mcallen, TX 78501 US	call_only_v

Emails

EMAIL DATE	ADDRESS	EMAIL TYPE
------------	---------	------------

10. **Save** your changes.

The component will be added to the Data Component page.

Data Components

⚙ Settings
Add Data Component

Search by Component Name 🔍

NAME	SYSTEM	TYPE	DESCRIPTION	STATUS
Alternate Keys	VCRM-US	Salesforce	Alternate keys	<input type="checkbox"/> DISABLED
CallData	VCRM-US	Salesforce	Call data	<input type="checkbox"/> DISABLED
CRM Account Details	VCRM-00DQ000000GK1IMAD	Salesforce	CRM account details from Verteo CRM	<input checked="" type="checkbox"/> ENABLED
CRM Activity Data	VCRM-00DQ000000GK1IMAD	Salesforce	Call Data from Verteo CRM	<input checked="" type="checkbox"/> ENABLED
CRM Admin View	VCRM-00DQ000000GK1IMAD	Salesforce	Verteo CRM - Admin View	<input checked="" type="checkbox"/> ENABLED
Service Cloud	ServiceCloud	Salesforce	Service Cloud Data Component	<input checked="" type="checkbox"/> ENABLED
Vault CRM US	vault-crm1116	Vault	HCP data from Vault CRM	<input checked="" type="checkbox"/> ENABLED



Preview data component

After a data component configuration is saved, you can preview the entire component.

1. Click **Preview Component**
2. In the dialog, add the Veeva ID of an HCP, HCO, or custom object record.

Enter a Veeva ID

Enter a Veeva ID (vid__v) for a top level entity (example: HCP or HCO) to preview the component.

242976928183616513

Cancel Continue

3. Click **Continue**.

The data component displays with the data returned from the report.

Data Component

Vault CRM US

Address

ID	ADDRESS ID	ADDRESS LINE 1	CITY	STATE	ZIP CODE	PRIMARY	INACTIVE	SAMPLE STATUS	LICENSE NUMBER	DEA NUMBER
V560000000P001	828533245556659200	4302 S Sugar Rd Ste 201	Edinburg	tx_v	78539-9140	false	false	Invalid	M1875	
V560000000P002	243367428875093002	1309 E Nolana Ave Ste C	Mcallen	tx_v	78504-6190	false	false	Invalid	M1875	
V560000000P003	932772891138513759	244 Lindberg Ave	Mcallen	tx_v	78501-2920	true	false	Invalid	M1875	BL7833410
V560000000P004	939085117890628451	1518 W Fern Ave	Mcallen	tx_v	78501-3210	false	false	Invalid	M1875	
V560000000P005	934075270778129278	1601 Kerita Ave	Mcallen	tx_v	78501-3836	false	false	Invalid	M1875	

Calls

CALL DATE	ADDRESS	CALL TYPE
2024-04-17	244 Lindberg Ave, Mcallen, TX 78501 US	call_only__v
2024-04-01	244 Lindberg Ave, Mcallen, TX 78501 US	call_only__v
2024-04-01	244 Lindberg Ave, Mcallen, TX 78501 US	call_only__v
2024-03-29	244 Lindberg Ave, Mcallen, TX 78501 US	call_only__v

Emails

EMAIL DATE	ADDRESS	EMAIL TYPE
------------	---------	------------

Note: User permissions are applied to the Admin or Data Manager user that is testing the query. For example, if you do not have access to records in France through your data visibility profile and you try to test the data component with a VID of an HCO in France, you will see a message that there is no record with this Veeva ID.



Clone a Vault data component

To create a similar Vault data component, you can clone an existing data component.

1. In a data component configuration, click **Clone**.
2. A New Data Component page displays with all the settings and the same queries of the existing data component.
3. Type a **Name** for this data component and make any required changes to the settings.
4. Click **Save**.

Use query variables

When you create a VQL query for a data component, use variable syntax to make the results of the query relevant to each profile.

The variables are fields on the entity.

Example

```
vid__v =:vid__v
```

When the data component is opened on a profile, the variable is swapped with the Veeva ID of that record.

```
vid__v =243243646072128514
```

Sample query 1 - Account details

Description: Retrieve the basic fields for an account.

Query

```
SELECT name__v, id, personemail__v, target__c, object_type__vr.name__v,
specialty_1__v, primary_parent__vr.name__v, do_not_call__v,
customer_master_status__v
FROM account__v
WHERE veeva_network_id__v = ':vid__v'
```

Important: For all sample queries, change the <network_external_id> placeholder to the ID field in Vault: veeva_network_id__v.

Headers: Name, ID, Email, Object Type, Specialty, Primary Parent, Do Not Call, Customer Master Status



Section Name Account **View Type** Table View

```
1 SELECT name__v, id, personemail__v, target__c, object_type__vr.name__v, specialty_1__v, primary_pa
2 FROM account__v
3 WHERE veeva_network_id__v = ':vid__v'
```

Headers Name,ID,Email,Target,Object Type,Specialty,Primary Parent,Do Not Call,Customer Master Status

Example results

Test Query: Account

[Hide Query Details](#)

```
SELECT name__v, id, personemail__v, target__c, object_type__vr.name__v, specialty_1__v, primary_parent__vr.name__v, do_not_call__vr
FROM account__v
WHERE veeva_network_id__v = '242979566124008448'
```

Name	ID
Ascension Health	V4T0000000B009
Email	Target
	false
Object Type	Specialty
Board	us__c
Primary Parent	Do Not Call
	no__v
Customer Master Status	
valid__v	



Sample query 2 - Address

Description: Address details for an account.

Query

```
SELECT id, veeva_network_id__v, name__v, city__v, state_province__v,
zip__v, primary__v, inactive__v, sample_status__v, license__v, dea__v
FROM address__v
WHERE account__vr.veeva_network_id__v = ':vid__v'
```

Headers: ID, Address VID, Address Line 1, City, State, ZIP Code, Primary, Inactive, Sample Status, License Number, DEA Number

Section Name

View Type

Table View ▼

Sample Que...

▶ Test Qu...

🗑

```
1 SELECT id, veeva_network_id__v, name__v, city__v, state_province__v, zip__v, primary__v, inactive__v,
2 FROM address__v
3 WHERE account__vr.veeva_network_id__v = ':vid__v'
```

Headers ID,Address VID,Address Line 1,City,State,ZIP Code,Primary,Inactive,Sample Status,License Number,DEA Number

Example results

Test Query: Address ✕

[Hide Query Details](#)

```
SELECT id, veeva_network_id__v, name__v, city__v, state_province__v, zip__v, primary__v, inactive__v, sample_status__v, license__v, dea__v
FROM address__v
WHERE account__vr.veeva_network_id__v = '243195409537696769'
```

ID	Address VID	Address Line 1	City	State
V5600000026238	243367429875093002	1309 E Nolana Ave Ste C	Mcallen	tx__v
V5600000026239	828533245556659200	4302 S Sugar Rd Ste 201	Edinburg	tx__v
V5600000026240	932772691138513759	244 Lindberg Ave	Mcallen	tx__v
V5600000026241	934075270778129278	1601 Kenia Ave	Mcallen	tx__v
V5600000026242	939085117890628451	1518 W Fern Ave	Mcallen	tx__v

Cancel

Save



Sample query 3 - Calls

Description: Latest calls for an account.

Query

```
SELECT call_date__v, address__v, call_type__v
FROM call2__v
WHERE account__vr.veeva_network_id__v = ':vid__v'
ORDER BY call_date__v desc
```

Headers: Call Date, Address, Call Type

Section Name **View Type**

```
1 SELECT call_date__v, address__v, call_type__v
2 FROM call2__v
3 WHERE account__vr.veeva_network_id__v = ':vid__v'
4 ORDER BY call_date__v desc
5
```

Headers

Example results

Test Query: Calls ✕

[Hide Query Details](#)

```
SELECT call_date__v, address__v, call_type__v
FROM call2__v
WHERE account__vr.veeva_network_id__v = '243195409537696769'
ORDER BY call_date__v desc
```

Call Date	Address	Call Type
2024-04-17	244 Lindberg Ave, Mcallen, TX 78501 US	call_only__v
2024-04-01	244 Lindberg Ave, Mcallen, TX 78501 US	call_only__v
2024-04-01	244 Lindberg Ave, Mcallen, TX 78501 US	call_only__v
2024-03-29	244 Lindberg Ave, Mcallen, TX 78501 US	call_only__v



Sample query 4 - Sample Calls

Description: Sample call details for an account.

Query

```
"SELECT call_date__v, address__v, ship_to_address_text__v, call_type__v
FROM call2__v
WHERE account__vr.veeva_network_id__v = ':vid__v' AND is_sampled_call__v =
true
ORDER BY call_date__v DESC"
```

Headers: Call Date, Address, Ship to Address, Call Type

Section Name	View Type			
Sample calls	Table View	Sample Queries	Test Query	
<pre>1 SELECT call_date__v, address__v, ship_to_address_text__v, call_type__v 2 FROM call2__v 3 WHERE account__vr.veeva_network_id__v = ':vid__v' AND is_sampled_call__v = true 4 ORDER BY call_date__v DESC</pre>				
Headers	Call Date, Address, Ship to Address, Call Type			



Sample query 5 - Emails

Description: Email details for an account.

Query

```
SELECT created_date__v, email_sent_date__v, account_email__v,
email_source__v, status__v, failure_msg__v, opened__v
FROM sent_email__v
WHERE account__vr.veeva_network_id__v = ':vid__v'
```

Headers: Created Date, Email Sent Date, Account Email, Email Source, Status, Failure Message, Opened

Section Name **View Type**

Table View ▾
Sample Que...
▶ Test Qu...
✕

```

1 SELECT created_date__v, email_sent_date__v, account_email__v, email_source__v, status__v, failure
2 FROM sent_email__v
3 WHERE account__vr.veeva_network_id__v = ':vid__v'
```

Headers

Example results

Test Query: Emails ✕

[Hide Query Details ▾](#)

```
FROM sent_email__v
WHERE account__vr.veeva_network_id__v = '243138646184559622'
```

Created Date	Email Sent Date	Account Email	Email Source	Status
2024-06-11T19:06:06.000Z	2023-09-06T17:00:00.000Z			active__v
2024-06-11T19:06:06.000Z				active__v
2024-06-11T19:06:06.000Z	2023-09-12T13:00:00.000Z	hchow@gmail.com		active__v
2024-06-11T19:06:06.000Z	2023-10-05T18:00:00.000Z			active__v
2024-06-11T19:06:06.000Z	2023-09-04T18:00:00.000Z			active__v
2024-06-11T19:06:06.000Z		hchow@gmail.com	Account.PersonEmail	active__v
2024-06-11T19:06:06.000Z	2024-01-17T19:56:48.000Z	John.Smith@gmail.com	Account.PersonEmail	active__v
2024-06-11T19:06:06.000Z		Anumpa.Pakur@gmail.com	Account.PersonEmail	active__v
2024-06-11T19:06:06.000Z		Elizabeth.Watts@gmail.com	Account.PersonEmail	active__v
2024-06-11T19:06:06.000Z		Ajay.Krikst@gmail.com	Account.PersonEmail	active__v
2024-06-11T19:06:06.000Z		Suzanne.Lille@gmail.com	Account.PersonEmail	active__v
2024-06-11T19:06:06.000Z		Maria.Colombo@gmail.com	Account.PersonEmail	active__v



Sample query 6 - Territory Alignment

Description: Retrieve which territories the account is aligned to.

Query

```
"select territory_vr.name__v, territory_vr.description__v, manual__v,
rule__v, created_date__v
  from account_territory__v
  where account__vr.veeva_network_id__v = ':vid__v'"
```

Headers: Territory Name, Territory Description, Manual, Rule Based, Created Date

Section Name

View Type

Table View ▼

Sample Que...

▶ Test Qu...

🗑

```
1 SELECT territory__vr.name__v, territory__vr.description__v, manual__v, rule__v, created_date__v
2 FROM account_territory__v
3 WHERE account__vr.veeva_network_id__v = ':vid__v'
```

Headers

Example results

Test Query: Territory ✕

Hide Query Details ▾

```
SELECT territory__vr.name__v, territory__vr.description__v, manual__v, rule__v, created_date__v
FROM account_territory__v
WHERE account__vr.veeva_network_id__v = '243138646184559622'
```

Territory Name	Territory Description	Manual	Rule Based	Created Date
101	MA	true	false	2024-07-01T19:05:18.000Z
102	NH	true	false	2024-07-01T19:05:26.000Z

Cancel

Save

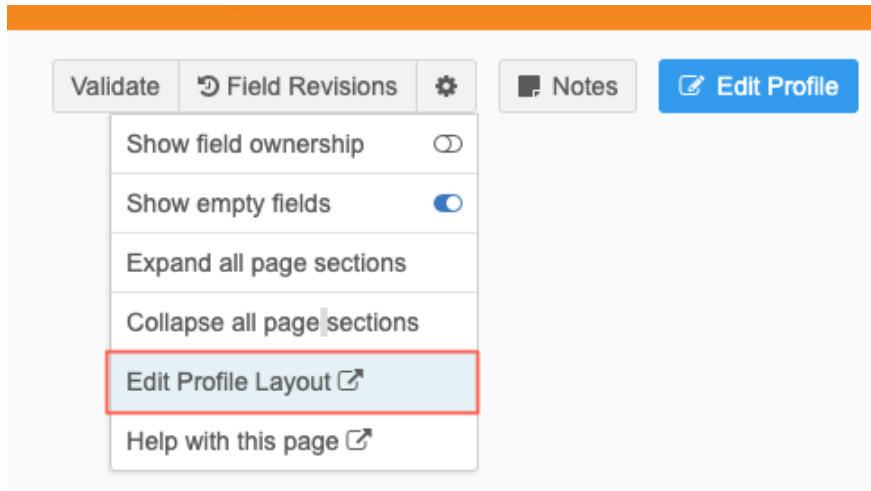


Profiles

ACCESS PROFILE LAYOUTS

24R2

Administrators and Data Managers can now access the profile layout for the record directly from the Profile page. Previously, Administrators had to navigate to the Data Visibility Profile and User pages to understand which profile layout was being used by a user in order to make layout changes to the Profile page.



This enhancement is enabled by default in your Network instance.

Link to profile layout

On the record profile, click the **View Options** menu.

- **View Profile Layout** - Click to view a standard (locked) profile.
- **Edit Profile Layout** - Click to view or edit a custom layout (not locked).

The profile layout will open in a new browser tab.

Supported users

The profile layout link is available for Data Managers, System Administrators, and System and Data Admin users.

Supported objects

The profile layout link displays on all HCP, HCO, and custom object records.



Match

CONDITIONAL MATCHING ON MATCH RULES

24R1.1

Administrators and Data Managers can create match filters that apply to all match rules in the match configuration. These subscription-level match filters can include or exclude specific records from being considered for match pairs. For example, you can create match filters for HCOs so the subscription match rules apply only to active HCO records that are hospitals.

Data Groups (3)	Match Rules (18)	Match Filters (3)	Ranked Filters Groups (2)
<p>Match filters configured here are applied at the subscription level to all records. Only records that meet these criteria will be compared in match rules.</p> <p>If no filters are configured here or in individual match rules, all records will be included in match comparisons. Filters configured on individual match rules will override match filters configured here.</p> <p>Match rules with cartesian or concatenation collations ignore match filters. Match filters can only be used in match rules that use direct collations.</p>			
<p>Entity <input type="text" value="Health Care Organization"/></p>			
FUNCTION	FIELD	VALUE	
<input type="text" value="Include"/>	<input type="text" value="hco_type__v (HCO)"/>	<input type="text" value="2 items selected"/>	AND x
<input type="text" value="Include"/>	<input type="text" value="hco_status__v (HCO)"/>	<input type="text" value="1 items selected"/>	x
<p>Add Filter</p>			

This feature is enabled by default in your Network instance.

Supported match configurations

Match filters can be applied at the match configuration or subscription-level.

- Default Match Configuration
- Source Subscriptions
- Ad Hoc Match Configuration
- Add Request Match Configuration
- Match Rule Collections
- Data Deduplication data maintenance subscriptions



Available filter methods

There are three types of filters that can be applied on match configurations:

Existing filter types

- **Filters on individual match rules** - Conditions created on a specific rule on the **Match Rules** tab. These filters override Match Filters.
- **Ranked filter groups** - A series of conditions that are applied after the typical match process. The conditions are prioritized so they are applied in a specific order to find the highest ranking match pair.

New filter type

- **Match Filters** - Conditions that are applied to all applicable match rules during the match process. Create the conditions on the **Match Filters** tab to include or exclude specific records from consideration.

Match Filter highlights

A new tab called **Match Filters** is added to all match configurations. Filters that are created on this tab will apply to all match rules in the configuration for the defined entity and its child objects and country group.

Key details

- Subscription-level filters are applied to the rules on the Match Rules tab.
- Filters apply to the defined entity and country group.
- Filters on individual match rules override filters on the **Match Filters** tab.
- Filters can include or exclude records.
- Filters can be applied to incoming records that do not have a value in a filtered field.

How match filters work

Match filters are applied to the existing match configuration to include or exclude specific records for consideration. ACT and ASK matches are determined based on the resulting record pairs and confidence values.

If filters are applied to individual match rules in the configuration, these subscription-level match filters are ignored when that match rule is processed.



Example use cases

Use subscription-level match filters to immediately include or exclude specific records from consideration during the match process.

- Only match on active HCOs; do not include non-active HCOs.
- Only match on active hospitals; do not include any HCOs that are not active and HCOs that are not hospitals
- Only match on pharmacies; do not include HCOs that are not pharmacies

Create match filters

To create a subscription-level filter to apply to all defined match rules:

1. Open a match configuration and select a country group.
2. Click the **Match Filters** tab.
3. Expand the **Entity** list and choose the object for the match filter.
4. Click **Add Filter**.
5. Expand the **Function** list and choose one of the following:
 - **Include** - Choose to define the records that the match rule will apply to.
 - **Exclude** - Choose to define the records that match rules will not apply to.
6. Choose the **Field** to filter match rules on.

Supported fields

- Active fields for the selected country and entity type.
 - Reference and text fields
 - Veeva standard fields and custom fields
7. Select the **Value** to filter match rules on. One or more values are supported.

If you select multiple values for a filter, the match rule considers all values.

Example

- **Function:** Include
- **Field:** HCO Type (hco_type__v)
- **Values:** Hospital, Department, Clinic

Result: The match rule considers records that are Hospitals, or Departments, or Clinics.



Data Groups (7) **Match Rules (31)** **Match Filters (1)** **Ranked Filters Groups (0)**

Match filters configured here are applied at the subscription level to all records. Only records that meet these criteria will be compared in match rules.

If no filters are configured here or in individual match rules, all records will be included in match comparisons. Filters configured on individual match rules will override match filters configured here.

Match rules with cartesian or concatenation collations ignore match filters. Match filters can only be used in match rules that use direct collations.

Entity:

FUNCTION	FIELD	VALUE
<input type="text" value="Include"/>	<input type="text" value="hco_type__v (HCO)"/>	3 items selected

[Add Filter](#)

- Clinic Only
- Department
- Hospital, General
- Administrative Service
- Advanced Emergency Medical Service Center
- After Hours Health Center
- Ambulatory Surgery Center

8. To include another filter, click **Add Filter**.

When multiple filters are defined, the filters are combined as an AND operation.

Example

FUNCTION	FIELD	VALUE
<input type="text" value="Include"/>	<input type="text" value="hco_status__v (HCO)"/>	1 items selected AND
<input type="text" value="Exclude"/>	<input type="text" value="hco_type__v (HCO)"/>	1 items selected

[Add Filter](#)

- Organization, Health System

- Filter 1: Include active HCO records
- Filter 2 Exclude HCOs that are health systems

Result: Match rules will consider all active HCOs *and* all HCOs except health systems.

9. **Save** your changes.

The filter will now be applied to all match rules for that entity and country group.



Applying filtered match rules to incoming records

When filters are applied to individual match rules or all match rules, the rules can consider incoming records even if they are missing the field value of the filter.

Previously, for match filters to work, the fields and values on filters had to exist on both the existing data in your Network instance and on the incoming data. Often, the incoming data is not as robust as the data in your instance, so records were skipped if they didn't contain the filtered field and value.

Set record options

The options to allow incoming records with empty values to be considered for match display on the **Match Rules** tab.

It applies to any filters on individual match rules on the Match Rules tab and to filters defined on the Match Filters tab.

The screenshot shows the 'Match Rules (12)' tab selected. Below the tabs, there is a text block explaining that Match Rules dictate how matching is performed. Below that is an 'Entity' dropdown menu set to 'Health Care Professional'. A red rectangular box highlights the following configuration options:

If filters are configured on individual match rules or on the "Match Filters" tab:

- Apply match rules whether incoming records have a value in a filtered field or not.
- Apply match rules only if incoming records have a value in a filtered field.

At the bottom of the interface, there is a section for 'Health Care Professional Features' with 'Default' and 'Override' radio buttons, and an '+ Add Feature' button.

- **Apply match rules whether incoming records have a value in a filtered field or not.**

This is the default option for all new match rules.

- **Apply match rules only if incoming records have a value in a filtered field.**

This is the default for existing match rules.

To allow incoming records with empty or missing field values to be considered for match rules, select the first option on the Match Rules tab.

If the incoming data is robust and has values in filtered fields, the second option can be selected.

This is supported when the filter function is **Include**. **Exclude** functions require the records to have the specified field and value.



Filters on individual match rules

Filters on individual match rules override any filters defined at the subscription level (Match Filters, Ranked Group Filters).

On the **Match Rules** tab, a message displays when a filter is added to a rule and if filters are configured on the **Match Filters** tab.

Logging filters

A new column, **Match filters in use**, is added to the Match + Data Group Analysis log to indicate if a match filter was used when the match pair was found.

Rule Name	Features	Advice	Match filters in use	Rank Group	Mode
NPI is identical	NPI is identical	ACT	Yes	Hospital HCO type	Local Network Link
Corporate names are identical	Corporate names are identical	ACT	Yes	Exclude Departments	Local Network Link
Corporate names are similar and addresses match	Corporate names are identical Addresses match	ASK	Yes		Local Network Link

Column values

- **Yes** - At least one subscription-level filter is enabled and used.

Note: Filters are applied to one object. Some matches might be found using rules that aren't filtered. The value will still be **Yes** to indicate that filters were in use.

- **No** - No subscription-level filters exist or were used to find the match pair.



MATCH COUNTS

24R1.1

Match configurations are updated to display a count of items on each tab. The count applies to the country and selected entity. If you change the entity, the count updates to reflect the new entity.

Match Default Configuration

Advanced Cancel Save

This page allows you to set your own default rules that can then be used by any subscription in this instance. If custom rules have not been defined for a particular country, Network's default rules are used. The default rules are periodically updated by Network as improvements are introduced.

Country

Data Groups (3)	Match Rules (18)	Match Filters (0)	Ranked Filters Groups (0)
-----------------	------------------	-------------------	---------------------------

Data can be grouped or blocked to make the matching process more efficient by only comparing similar entities. For instructions on setting up Data Groups, please refer to the [online help](#).

This enhancement is enabled by default in your Network instance.

FILTERING INDIVIDUAL MATCH RULES

24R1.1

Filters are supported on individual match rules that use the **Direct Fields** comparison method only. If the match rule uses any other comparison method, the filters are ignored.

This is existing behavior.

A message now displays when a filter is created on a match rule that uses the **Concatenated fields** or **Sets of fields** comparison methods:

Filters are supported for the "Direct Fields" comparison method; filters on other comparison methods are ignored.

Apply filters ⓘ ⚠ Filters are supported only for the "Direct Fields" comparison method; filters on other comparison methods are ignored.

Field	Values	Function	
<input type="text" value="hcp_type__v (HCP)"/>	<input type="text" value="1 Items selected"/>	<input type="text" value="Include"/>	✕

[+ Add Filter](#)

Comparison method ⓘ

This enhancement is enabled by default in your Network instance.



Data privacy

DATA PRIVACY OPT OUT (24R2.0)

24R2

Veeva OpenData now manages HCP opt outs in Taiwan (TW).

Two data model fields have been enabled for these countries for the HCP object:

- `data_privacy_opt_out__v`
- `data_privacy_opt_out_date__v`

Records that are opted-out by Veeva OpenData do not display and cannot be accessed in downstream systems. This ensures data privacy for opted-out HCPs to satisfy regional regulatory requirements.

Opt out from marketing

The `opt_out__v` field is also enabled for Taiwan. This field indicates that the HCP wants to opt-out of OpenData. It is informational only.

DATA PRIVACY OPT OUT (24R1.1)

24R1.1

Veeva OpenData now manages HCP opt outs for the following 23 countries in the Latin America region:

- Argentina (AR)
- Bahamas (BS)
- Barbados (BB)
- Bermuda (BM)
- Bolivia (BO)
- Cayman Islands (KY)
- Chile (CL)
- Colombia (CO)
- Costa Rica (CR)
- Curacao (CW)
- Dominican Republic (DO)
- Ecuador (EC)
- El Salvador (SV)
- Guatemala (GT)
- Honduras (HN)
- Jamaica (JM)
- Mexico (MX)
- Nicaragua (NI)
- Panama (PA)
- Paraguay (PY)
- Peru (PE)
- Trinidad and Tobago (TT)
- Uruguay (UY)

Two data model fields have been enabled for these countries for the HCP object:

- `data_privacy_opt_out__v`
- `data_privacy_opt_out_date__v`

Records that are opted-out by Veeva OpenData do not display and cannot be accessed in downstream systems. This ensures data privacy for opted-out HCPs to satisfy regional regulatory requirements.

This enhancement is enabled by default in your Network instance.



Opted-out countries

To review the list of opted-out countries, in the Admin console:

1. Click **Data Model > Data Domains** and choose the **Customer Master** domain.
2. Select the **Health Care Professional** object and find the `data_privacy_opt_out__v` field in the **Fields** section.
3. Click the field to review the list of opted-out countries that are managed by Veeva OpenData.

Data model

CLUSTER MANAGEMENT

24R2

Updated cluster codes are available for the following country/provider combinations:

- Portugal - HMR
The new cluster version is Version 4.0.
- Italy – IQVIA (Microbricks)
The new cluster version is Version 2.0

To update addresses with the latest cluster codes:

1. In the Admin console, click **Data Model > Cluster Management**.
2. Select the country/provider cluster configuration.
3. In the **Cluster Management Details** section, expand the **Cluster Version** field and choose the newest version.
4. **Save** your changes.
5. Click **Refresh Addresses** to run a data maintenance job to ensure that all addresses for the country have the latest cluster codes.

The new cluster version is available by default if you have these country/provider combinations enabled in your Network instance.



MULTIVALUED REFERENCE FIELDS

24R2

Multiple value reference fields are now supported for Network data model fields. This includes Veeva fields, custom fields, and CDA fields.

This enhancement is enabled by default in your Network instance.

Key highlights

- Supports mapping to Vault CRM and Veeva CRM multivalued picklist fields
- Supports fields in the Common Data Architecture (CDA)
- Fields can contain a maximum of 50 values

John Smith ☆

#emergency #md #npi #physician

FULL ADDRESS 751 S Bascom Ave San Jose CA 95128-2604
Prescriber, Emergency Medicine

Custom Fields

Copied from Specialty ⓘ

Allergy & Immunology Naturopathic Medicine
Brd Cert Pediatric Transplant Hepatology Anatomic Pathology
Neonatal-Perinatal Medicine Pediatric Urology Aerospace Medicine
Musculoskeletal Radiology Pediatric Surgery Allergy Naprapathy
Pediatric Transplant Hepatology Advanced Practice Dentistry

Custom Text Field ⓘ
No Value

Primary Address VID ⓘ
243342584980702208

Supported objects and fields

- **Objects** - Multivalued reference type fields can be created on all Veeva objects and custom objects.
- **Fields** - Supported for new Veeva fields, custom fields, and CDA fields

Note: Existing fields cannot be changed to support multiple values.



Supported features

Multivalued reference fields are supported in the following Network features:

- Data model (Network and CDA)
- Record Profiles
- Revision History
- Data Lineage
- Data Updater
- Profile Layouts
- Search (including Advanced Search)
- Source Subscriptions
- Target Subscriptions
- Reporting - Advanced queries only (SQL Query Editor)
- Vault CRM Bridge

Create a multivalued reference field

Administrators and Data Managers can create custom fields that support multiple values.

On the Custom Field configuration:

1. In the **Type** list, choose **Reference**.
2. Select the **Allow Multiple Values?** option.

The option cannot be turned off after the field is created.



Create Custom Field

FIELD

On this page: [Properties](#) · [Country Visibility and Field Rules](#) · [Change Procedure](#) · [Labels](#)

▼ **Properties**

Name * ⓘ _c

Effective Version ⓘ N/A

Type ⓘ Reference ▼

Reference Type Language ▼

Enabled?

Allow Multiple Values?

The field values will be stored as a comma separated list.

Updating fields

Multivalued fields can be updated using source subscriptions and data updater.

A new advanced property is added to support these fields. The property defines the delimiter for multivalued fields. By default, the delimiter is a comma (,).

New property

```
feed.multivaluedattribute.separator: (string, default ",")
```

The import file should include a comma separated list of values for the field.

Field value limit

A maximum of 50 values can be included in the import file. If the file contains more than 50 values for one field, the record is skipped and a warning displays in the Job Error Log.

Note: Updating multivalued fields through DCRs or on the Profile page is not supported in this release.



Profile page

On record profiles, you can view all values for the field. Four rows of values display by default. Use the scroll bar to see additional values.

Custom Fields

- Alternate Key** ⓘ
P10000021 🔒
- Customer Role** ⓘ
No Value
- HCP Role** ⓘ
No Value
- Copied from Specialty** ⓘ
Chronic disease Internal Medicine_Geriatric Disease
Intensive Care Unit (ICU) Special Consultation Functional Exam
Family Practice Tuberculous Head and Neck
Advanced Heart Failure General Surgery General Medicine
Disease Control Deathbed Care Internal Medicine Allergy
- Cholecap Decile** ⓘ
No Value
- Status** ⓘ
Active 🔒
- HCP Role** ⓘ
Doctor of Medicine
- Is Target** ⓘ
No Value

Multivalued reference fields are read-only on the Profile page.

Summary cards

Multivalued fields can be added as fields on the record summary header and sub-object summary cards. A few values display beside the field with a count of additional fields. Click the count to open a pop-up that displays all the field values.

Licenses (2 active)

- 60235867**
 - LICENSE DEGREE** Doctor of Medicine
 - LICENSING AUTHORITY** New York
 - ALL SPECIALTIES** Anatomic Pathology, Addiction Psychiatry, Addiction Medicine, +11 more
 - LICENSE TYPE** State

Licensing Authority ⓘ NY 🔒	License ⓘ 60235867
License Degree ⓘ MD 🔒	All Specialties ⓘ Anatomic Pathology Addiction Psychiatry Addiction Medicine Acupuncture



Fields are configured for these summaries in the profile layout (**Data Model > Profile Layout**). Edit the field and select the **Is Summary Field?** option.

View revisions

Multivalued fields display in the Network features that identify revisions so you can review and compare the revisions of the record and field.

The following features are updated to support the fields:

- Revision History
- Field Revisions
- Version History tab (Profile page)
- Data Lineage

Example Revision History

The **Version** columns display a comma separated list and a count of additional values. Click the count to open a pop-up to display all values.

Revision History			
VERSION	TIMESTAMP	SYSTEM	ACTION
3.0	2024-07-11 10:02:57 IST	Data Change Request Data	Update from change_request
2.0	2024-07-11 09:58:43 IST	Data Change Request Data	Update from change_request
1.0	2024-02-05 17:38:19 GMT	Master Changeset Import	Add from OpenData
JOB SUMMARY			
Job ID 7869		Start Time 2024-07-11 10:02:00 IST	
Subscription data_updater_update_records_v		Duration a minute	
FIELD	VERSION 2.0	VERSION 3.0	
Date Modified	2024-07-11 09:58:43 IST	2024-07-11 10:02:57 IST	
CUSTOM FIELDS			
All Specialties CDA	AI (Allergy & Immunology), NAT (Naturopathic Medicine), TPP (Brd Cert Pediatric Transplant Hepatology), ATP (Anatomic Pathology), NPM (Neonatal-Perinatal Medicine), UP (Pediatric Urology), AM (Aerospace Medicine), MSR (Musculoskeletal Radiology), PDS (Pediatric Surgery), A (Allergy), NAP (Naprathopathy), PTP (Pediatric Transplant Hepatology), DAP (Advanced Practice Dentistry), MGP (Molecular Genetic Pathology (Pathology)), PPR (Pediatric Rheumatology) +15 more	AI (Allergy & Immunology), NAT (Naturopathic Medicine), TPP (Brd Cert Pediatric Transplant Hepatology), ATP (Anatomic Pathology), NPM (Neonatal-Perinatal Medicine), UP (Pediatric Urology), AM (Aerospace Medicine), MSR (Musculoskeletal Radiology), PDS (Pediatric Surgery), A (Allergy), NAP (Naprathopathy), PTP (Pediatric Transplant Hepatology), DAP (Advanced Practice Dentistry), MGP (Molecular Genetic Pathology (Pathology)), PPR (Pediatric Rheumatology) +35 more	



Use the search bar to find a specific value. A count of all values displays below the search bar.

All Specialties CDA ✕

Q Search

30 Values

- AI (Allergy & Immunology)
- NAT (Naturopathic Medicine)
- TPP (Brd Cert Pediatric Transplant Hepatology)
- ATP (Anatomic Pathology)
- NPM (Neonatal-Perinatal Medicine)
- UP (Pediatric Urology)
- AM (Aerospace Medicine)
- MSR (Musculoskeletal Radiology)
- PDS (Pediatric Surgery)
- A (Allergy)
- NAP (Naprathopathy)
- PTP (Pediatric Transplant Hepatology)
- DAP (Advanced Practice Dentistry)
- MGP (Molecular Genetic Pathology (Pathology))
- PPR (Pediatric Rheumatology)
- ASO (Advanced Surgical Oncology)
- NSP (Pediatric Surgery (Neurology))
- OMO (Musculoskeletal Oncology)
- AHF (Advanced Heart Failure)
- MOS (MOHS Surgery)
- PRM (Rehabilitation Medicine Pediatric)
- HFT (Advanced Heart Failure & Transplant Card)
- MGG (Molecular Genetic Pathology (Genetics))
- RPM (Pediatric Rehabilitation Medicine)
- AUD (Audiology)
- PTH (Anatomic/Clinical Pathology)
- AN (Anesthesiology)
- CPP (Pediatrics/Psychiatry)
- CTR (Cardiothoracic Radiology)
- NS (Neurological Surgery)

Example Field Revision

All values also display on the Field Revisions dialog. Click the count to expand the value list.

John Smith Field Revisions ✕

Export Select Columns ▾

VERSION	TIMESTAMP	LAST NAME	SPECIALTY 1	FIRST NAME	ALL SPECIALTIES CDA
3.0	2024-07-11 11:02:57	Alvarez	EM (Emergency Medicine)	Alai	AI (Allergy & Immunology), NAT (Naturopathic Medicine), TPP (Brd Cert Pediatric Transplant Hepatology), +47 more
2.0	2024-07-11 10:58:44	Alvarez	EM (Emergency Medicine)	Alai	AI (Allergy & Immunology), NAT (Naturopathic Medicine), TPP (Brd Cert Pediatric Transplant Hepatology), +27 more
1.0	2024-02-05 18:38:19	Alvarez	EM (Emergency Medicine)	Alai	

Export field revisions

If you export field revisions, the values display in the exported .csv file as a comma separated list containing the reference code and label.

Example

Health Care Professional_940909739000335711_fieldRevisions

Revision Number	Revision Date	HCP Type	Multivalued 1	Email 1
4.0	2024-01-18T12:14:54Z	D (Doctor)	OBG (Obstetrics & Gynecology), CLP (Clinical Pathology)	
2.0	2022-08-26T12:15:29Z	D (Doctor)	OBG (Obstetrics & Gynecology), CLP (Clinical Pathology)	gemma.moreno@ginemed.es



Data change requests

Multivalued reference fields are read-only on data change requests. Data Stewards can view the values but no action is required.

Changes submitted for multivalued fields from the Network API are automatically rejected in this release. Changes are not supported in the Network UI; the fields are read-only.

Exporting data

Target subscriptions are updated to include a new setting so you can define the delimiter for multivalued fields that are sent to downstream systems.

In the **General Export Options** section, the **Multiple Value Fields Delimiter** option is set to a comma (,) by default. Change the delimiter if the downstream system expects a different delimiter.

The following delimiters are supported:

- , (comma) (default)
- : (colon)
- ; (semi-colon)
- tab
- | (pipe)

New Target Subscription

Export by VID Cancel Save

General Export Options

TARGETED RECORD OPTIONS

Full Data Extract Full Delta

Record Type

Record State All Valid & Under Review Unmask Opt-out Records ⓘ

Apply Record Limit ⓘ

Export Only Updated Sub-Objects ⓘ

Save Delta State

Include Source Data view in export files ⓘ

Unmapped Reference Codes

Multiple Value Fields Delimiter
(This field is highlighted with a red box in the original image)



Reporting

When multivalued fields are used in the SQL Query Editor, they are treated as a String. Values are stored as separated list of reference codes: (V1,V2,V3)

Query tips

- Using `SELECT *` or `SELECT <multi_value_field>__v`, the value will be returned as 'V1,V2,V3'

- To filter the table on exact match use:

```
WHERE <multi_value_field>__v = 'V1,V2,V3'
```

- To filter on a single value, use string functions.

Example

```
WHERE <multi_value_field>__v LIKE '%V1%'
```

or

```
WHERE STRPOS(<multi_value_field>__v, 'V1`)>0
```

- To filter on any of values, repeat the conditions for each of the expected matches.

Example

To get matches on either V1 or V2

```
WHERE (<multi_value_field>__v LIKE '%V1%' OR <multi_value_field>__v  
LIKE '%V2%')
```

- To filter on a set of values, repeat the conditions for each of expected matches.

Example

To get matches on both V1 and V2

```
WHERE (<multi_value_field>__v LIKE '%V1%' AND <multi_value_field>__v  
LIKE '%V2%')
```

- Order is evaluated on the value list as string literals.

Example

'V1, V2, V3' comes before 'V2, V3' in the following:

```
ORDER BY <multi_value_field>__v
```



Report results

Multivalued fields always display as a comma separated list of codes as a string containing the code, for example, OBG, CLP.

Network API

Retrieve Field Details MetaData API

A new parameter is added to identify multivalued reference fields.

For more details, see the "API" section in these *Release Notes*.

Search API considerations

Use the `fieldQueries` parameter to refine the results for multivalued fields. The `filters` parameter is not supported.

NEW LANGUAGE

24R1.1

Ukrainian (UK) is now supported for reference data.

This enhancement is enabled in your Network instance by default.

Select the language for reference codes

To view reference codes in this language:

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

Note: Ukrainian is not supported for data model fields and the Network UI.

CLUSTER MANAGEMENT

24R1.1

Updated cluster codes from IQVIA are available for the following countries:

- Belgium
- Czech Republic
- Slovakia

The new cluster version for these countries is Version 2.0.

The new cluster version is available by default if you have the IQVIA country/provider combination enabled in your Network instance.



Update addresses

To update addresses with the latest cluster codes:

1. In the Admin console, click **Data Model > Cluster Management**.
2. Select the country / IQVIA cluster configuration.
3. In the **Cluster Management Details** section, expand **Cluster Version** and choose **Version 2**.
4. **Save** your changes.
5. Click **Refresh Addresses** to run a data maintenance job to ensure that all addresses for that country have the latest cluster codes.

PRIMARY FIELD CONFIGURATIONS

24R1.1

New primary custom fields are now supported for Unique Checkbox types only. The **Network Calculated** option will be disabled for new primary field configurations for all sub-objects including addresses and parent HCO objects.

Network Calculated primary field logic is available using the Unique Checkbox configurations.

This enhancement is enabled by default in your Network instance.

Benefits of Unique Checkbox fields

Unique Checkbox configurations contain the same functionality as Network Calculated configurations but are more robust and include these added benefits:

- **Supported objects** - Unique Checkbox is supported for all sub-objects and relationship objects. Network Calculated was supported for Address and Parent HCO objects only.
- **Multiple primaries** - You can create more than one primary field for each object. This enables you to have one primary per therapeutic area. Only one field per object is supported for Network Calculated configuration.
- **Customizations** - Use the standard Network logic to recalculate primary or customize the logic and define for specific conditions.

Allow Network to calculate Unique Checkbox primary fields

The Network Calculated primary configuration was used to ensure that a record always has an active and valid primary defined.

Network Calculated primary behavior

Network would automatically calculate a primary for the following conditions:

- **No primary** - The record does not contain a primary or a primary was removed.
- **Inactive primary** - The current primary is inactive.
- **Invalid or Deleted primary** - The current primary is invalid or deleted.

These options can also be set on the Unique Checkbox primary configuration.



Configure Unique Checkbox as Network Calculated

To set the Network Calculated behavior on the Unique Checkbox configuration, select the following settings:

When to Calculate Primary section:

- **The record DOES NOT HAVE a primary**
- **The status of the primary is INACTIVE**
- **The record state of the primary is INVALID or DELETED**

Primary Recalculation Logic:

- **Use standard logic**

These settings will use the same business rules and logic to ensure that records have a primary defined.

For more information about these settings, see [Create a Unique Checkbox primary](#) in the *Veeva Network Online Help*.

Example Unique Checkbox configuration



Create Custom Field

FIELD

On this page: [Properties](#) · [Country Visibility and Field Rules](#) · [Change Procedure](#) · [Labels](#)

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

▼ Properties

Name * _c

Effective Version ⓘ N/A

Type ⓘ Primary

Configuration ⓘ Unique Checkbox

When to Calculate Primary Address

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

Primary Address Recalculation Logic

- Use standard logic
- Define custom logic

Select new primary Address where:

	CONDITION
IF	Source Rank on primary field is the same or higher than that on existing primary Address.
ELSE IF	Address rank is the highest.
ELSE IF	Last updated time of primary field is the latest.
ELSE	Address Entity ID is the newest.

Exclude Addresses that meet the following criteria when recalculating primary Address:

FIELD	VALUE
Record State (record_state__v)	Invalid
Status (address_status__v)	Inactive

[+ Add Field](#)

Enabled?

Support for existing Network Calculated primary fields

Existing Network Calculated primaries are not impacted by this change. They will continue to work as expected.

You can change an existing Network Calculated configuration to Unique Checkbox by changing the primary type from the Data Model page.



Custom domains

GLOBAL ENTITIES

24R1.1

Administrators and Data Managers can now load and manage top-level entities that do not belong to a specific country.

Some custom objects, like Products and Brands, are not country-specific. For example, Cholecap, is a global brand, but it has country-specific package configurations.

A primary country called Global is now available to assign to these entities so you can manage them in Network.

The screenshot shows the Veeva Network interface for a 'Cholecap' entity. The top navigation bar includes 'HOME', 'INBOX', 'MY REQUESTS', 'AD HOC MATCH', 'REPORTS', 'NETWORK EXPLORER', 'DATA UPDATER', and 'FILE EXPLORER'. A search bar is present with the text 'Search by name, address, IDs, WhasTag, and more...'. The main content area displays the entity 'Cholecap' with a pill icon, 'ENTITY TYPE Brand', and 'VID 944718584535385695'. A red box highlights the 'Cholecap' name. Below this, there are sections for 'Primary Information' and 'Record Information'. In the 'Primary Information' section, 'Primary Country' is set to 'Global' and is highlighted with a red box. Other fields include 'Name' (Cholecap), 'Record State' (Valid), and 'Status' (Active). To the right, a 'HIERARCHY' diagram shows 'Wag-Metoprolol' as a parent entity with three child entities. A button 'Open in Network Explorer' is located at the bottom right of the hierarchy section.

This enhancement is available by default in your Network instance.

Supported objects

Use the Global primary country for custom objects only.

Do not use the Global country for Veeva standard objects. HCPs and HCOs depend on country-specific data models.

Global country code

All country codes are defined in the `AddressCountry` reference type (**Data Model > Reference Data**).

The **AA** country code definition is now *Global*.



Note: The Global country code represents a "virtual" country to designate entities that do not have a specific country; it does not mean *all* countries.

Use this reference code for custom objects that do not belong to a specific country.

The screenshot shows the Veeva Network interface. The top navigation bar includes 'OVERVIEW', 'SYSTEM SUMMARY', 'LOGS', 'USERS & PERMISSIONS', 'DATA MODEL', 'SYSTEM INTERFACES', 'WIDGETS & PORTAL', and 'FILE EXPLORER'. The main content area is titled 'Reference Codes - AddressCountry'. A dropdown menu for 'Country' is set to 'All countries'. Below this is a table with columns: NETWORK CODE, NETWORK NAME, DEFINITION, CODE ACTIVE?, and ACTIVE IN ALL COUNTRIES?. The first row, representing the 'Global' entity with code 'AA', is highlighted with a red border. Other rows include 'AD' (Andorra), 'AE' (United Arab Emirates), and 'AF' (Afghanistan).

Country	NETWORK CODE	NETWORK NAME	DEFINITION	CODE ACTIVE?	ACTIVE IN ALL COUNTRIES?
All countries	AA	Global	Global	✓	✓
	AD	Andorra	Andorra	✓	✓
	AE	United Arab Emirates	United Arab Emirates	✓	✓
	AF	Afghanistan	Afghanistan	✓	✓

Create a data visibility profile

To view global entities in Network, there must be a data visibility profile assigned to the Global primary country.

Create a data visibility profile (DVP) and then assign it to users that should have permission to view and access these entities.

1. In the Admin console, click **Users > Data Visibility Profile**.
2. Click **Add New Profile**.
3. Type a **Name** and **Description**.
4. Expand the **Country Specification** list and choose **Global**.

Important - Global does not mean that users can view records for all countries. It means that users can view the records that use the **AA** country code.

5. For each custom object listed, specify **All** or **No** visibility. Select **All** so users can view records that use the **AA** country code.

Note: HCP and HCO visibility is **All** by default but a DVP for the Global primary country does not apply to these objects: HCP and HCO records should never use the **AA** country code.

6. Define the additional permissions and assign profile layouts for each object.
For more details see [Working with data visibility profiles](#) in the *Veeva Network Online Help*.
7. Assign the DVP to any Network user that requires access to the global entities (**Users & Permissions > Users**).



Example DVP

Visibility Profiles > Add New Profile

Add New Profile

Cancel Save

▼ Primary Information

Profile Name* Global_data

Description DVP for custom objects that have no specific country (ex. brand, products)

Default (When Creating New User) False

▼ Permissions

Country Specification Global

Health Care Professional Visibility All HCPs Include HCPs Exclude HCPs

Health Care Organization Visibility All HCOs Include HCOs Exclude HCOs

Package Visibility All Packages No Packages

Company Visibility All Companies No Companies

Market Basket Visibility All Market Baskets No Market Baskets


Product Visibility All Products No Products

Brand Visibility All Brands No Brands

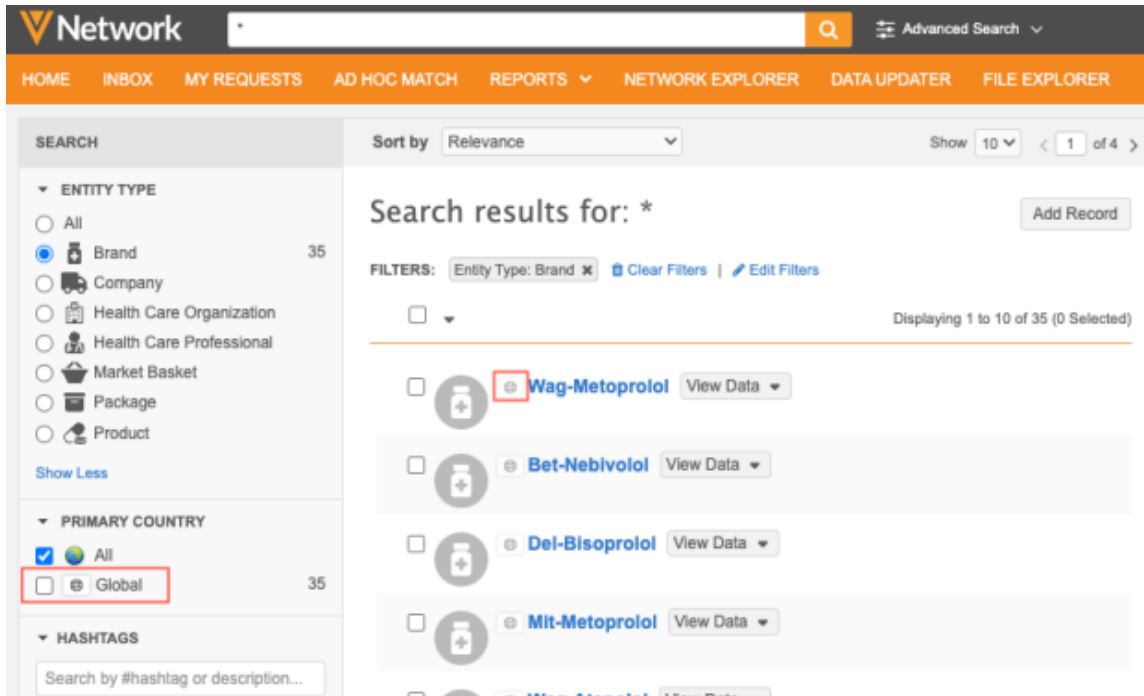
Data Read-only access False

Search for global entities

Users that have access to global entities through the data visibility profile can search for these objects.

The Global  country flag displays beside records in the search results.

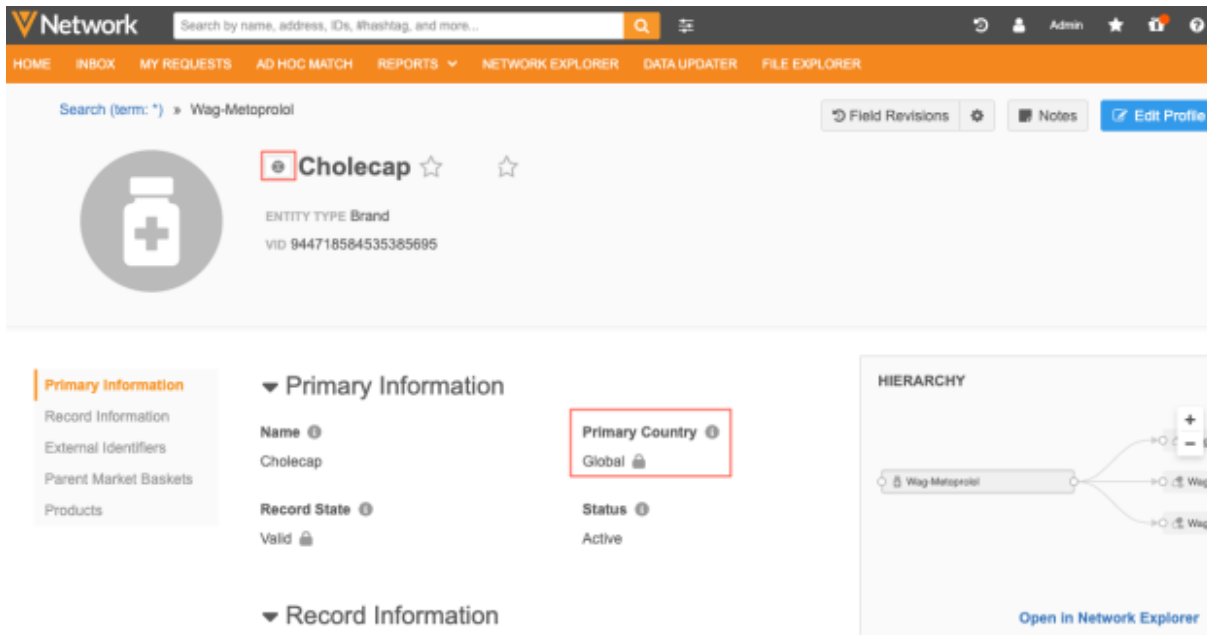
You can also use the **Primary Country** facet to filter the search results for objects with the Global primary country.



Global entity profiles

Records that are loaded into Network using the **AA** country code display the Global country flag beside the object name.

The **Primary Country** field value is **Global**.





Data model for global entities

The Global primary country uses the Other Countries (ZZ) data model. This data model determines the fields and values that are available to use for global entities in Network.

Custom fields

When you add custom fields to a global entity, the custom field configuration must specify the Other Countries data model.

In the **Country Visibility and Field Rules** section, ensure that Other Countries is listed.

The screenshot shows the 'Create Custom Field' configuration page in Veeva Network. The breadcrumb trail is 'Product Master > Brand > Create Custom Field'. The page title is 'Create Custom Field' with a sub-label 'FIELD'. Below this, there are 'Cancel' and 'Save' buttons. The main section is 'Country Visibility and Field Rules', which is expanded to show a list of countries. The 'Other Countries' option is highlighted with a red box. Below the country list, there is a 'Rule Type' dropdown menu currently set to 'Default Value'. The left sidebar shows a navigation menu with categories like 'Data Domains', 'CUSTOMER MASTER', 'PAYER MASTER', 'PRODUCT MASTER', and 'Brand'. The 'Brand' category is selected, and sub-items like 'Company', 'Market Basket', 'Package', 'Product', 'Custom Key', 'Indication', 'Market Basket Content', 'Package Content', and 'Product Brand Relationship' are visible. A 'Lookup Tables' section is also present at the bottom of the sidebar.



Network expressions

NEW FUNCTIONS

24R2

The following functions are now supported in Network Expressions.

SPLIT

Use to split strings into a collection and then join appending/concatenating/updating values.

```
SPLIT((string))
```

Example

Split a string with a separator into a collection.

```
all_specialties__c = "AA,BB,CC,DD,XX,YY,ZZ"
```

NEX rule

```
SPLIT(all_specialties__c, ',')
```

Result

```
["AA", "BB", "CC", "DD", "XX", "YY", "ZZ"]
```

GETOBJECTNAME

Use to check the entity type of the record. Available to use in source subscriptions and custom fields.

```
GETOBJECTNAME ()
```

Example

Use the function on a custom field to concatenate the entity type with a value; for example, the Veeva ID (VID).

```
CONCAT (GETOBJECTNAME (), vid__v)
```

Important: This function is the same as `GETTARGETTYPE ()`, but `GETTARGETTYPE ()` is not supported in the NEX Tester. Use `GETOBJECTNAME ()` instead.



NEX TESTER ENHANCEMENTS

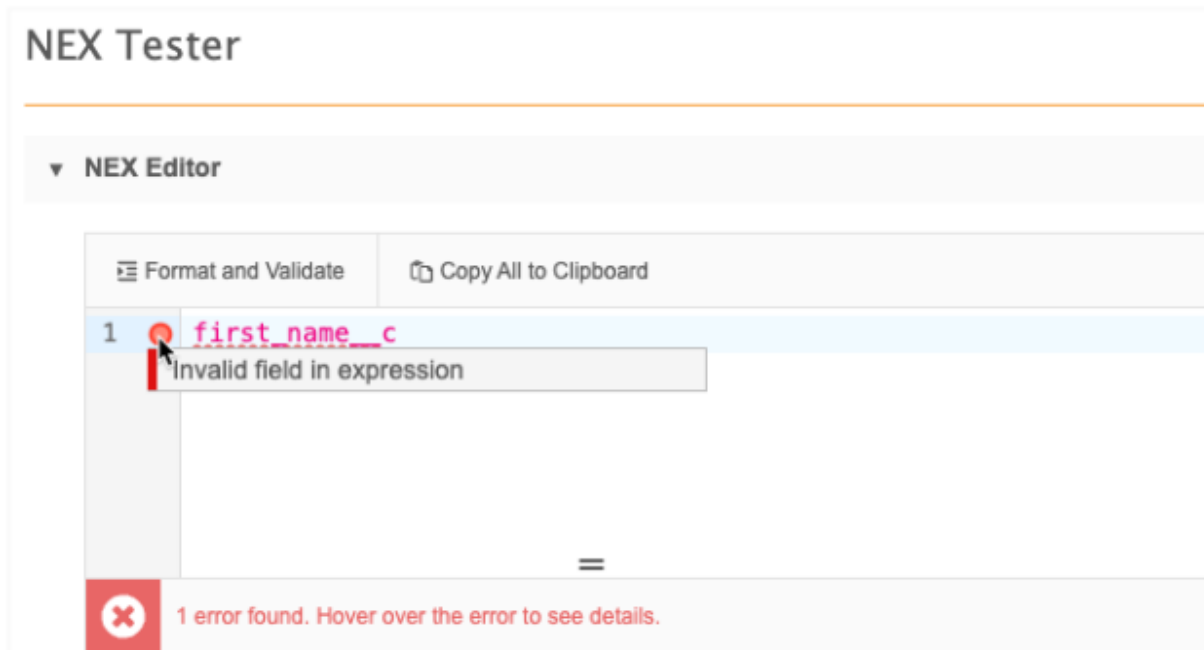
24R2

The following updates have been made to the NEX Tester feature. They apply anywhere NEX rules can be tested in Network (NEX Tester, data model fields, OpenData subscriptions, transformation rules).

These enhancements are enabled by default in your Network instance.

Field name validation

Network now validates the field names that are used in expressions. If a field name is not valid, an error displays.



Testing expressions

After you click **Evaluate Formula** to test an expression, the results will continue to be available if you update the expression. Previously, when you edited an existing expression, the results and parameters disappeared. Now, you can continue to view the parameters that were used as you update the expression.



▼ **NEX Editor**

☰ Format and Validate
📄 Copy All to Clipboard

1 ● `concat(first_name__v, '|')`

=

✖ 1 error found. Hover over the error to see details.

▼ **Test NEX**

Enter a Veeva ID (vid__v) to get formulated value

Veeva ID (vid__v)

✖

Evaluate Formula

RESULT

VALUE
John

Parameters used for the formula

ATTRIBUTE LABEL	ATTRIBUTE CODE	VALUE
First Name	first_name__v	John



Testing sub-object expressions

You can now use a sub-object Veeva ID to test an expression. For example, to test an expression for an address, add an address VID. Previously, only entity VIDs were supported.

▼ NEX Editor

Format and Validate Copy All to Clipboard

1	address_line_1__v
---	-------------------

=

NEX is valid

▼ Test NEX

Enter a Veeva ID (vid__v) to get formulated value

Veeva ID (vid__v)

Evaluate Formula

RESULT

VALUE

751 S Bascom Ave

Parameters used for the formula

ATTRIBUTE LABEL	ATTRIBUTE CODE	VALUE
Address Line 1	address_line_1__v	751 S Bascom Ave



NEW OPERATORS

In this release, the following operators are now supported:

- UNION
- UNION (ALL)
- INTERSECT

These functions provide Data Managers with more flexibility to combine and filter data collections, enabling them to tailor data for specific use cases.

This enhancement is enabled by default in your Network instance.

UNION operator

UNION operator is used to combine the result set of two or more collections.

Usage

```
<collection> UNION <collection>
```

Example

```
[ "foo", "star", "ball", "app" ] UNION [ "foo", "bar", "fox", "app" ]
```

Result

```
[foo, star, ball, app, bar, fox]
```

The UNION operator selects only distinct values by default. To allow duplicate values, use UNION ALL.

UNION ALL

Use to combine all result sets of two or more collections.

Usage

```
<collection> UNION ALL <collection>
```

Example

```
[ "foo", "star", "ball", "app" ] UNION ALL [ "foo", "bar", "fox", "app" ]
```

Result

```
[foo, star, ball, app, foo, bar, fox, app]
```



INTERSECT

Use to combine values in the result set that are common to both collections.

Usage

```
<collection> INTERSECT <collection>
```

Example

```
[ "foo", "star", "ball", "app" ] INTERSECT [ "foo", "bar", "fox", "app" ]
```

Result

```
[foo, app]
```

Systems

VIEWING SYSTEMS

24R1.1

The sort order of systems is now retained for each user on the Systems page. The defined systems can be sorted using any of the columns in the table. If you sort the systems, the order will be preserved the next time you access the page.

Systems Add System				
NAME	TYPE	DESCRIPTION ▲	THIRD PARTY MASTER	PROPRIETARY
change_request		Data Change Request Data		
network_portal__v		Network Portal		
opendata_opt_outs__v		OpenData Opt-Outs		
VCRM	Veeva CRM	Veeva CRM integration		
Vault	Veeva Vault	Veeva Vault integration		
Temp	Custom	Z System for ad hoc updates		

Tip: For systems that are rarely or no longer used, assign a "Z" to the description so those systems remain at the bottom of the list.

This enhancement is enabled by default in your Network instance.



Transformation rules

The following enhancements are added for transformation rules in this release. They are enabled by default in your Network instance.

NETWORK WIDGET SUPPORT

24R1.1

Transformation rules can now be used to transform data that is downloaded from Network widgets. For example, you can use rules to limit type of addresses that display on downloaded records.

Transformation rules are supported for Search widgets, and the Profile DCR widget.

Note: Transformation rules are not applied to the data displayed in the widget.

Configure transformation rules for widgets

To support Network widgets, transformation rules can be applied to Search and Retrieve API calls for a system. This enables the rules to be applied for any user that uses the widget. Previously, rules could be applied to the API calls for individual integration users only.

This can be specified in the rule configuration.

Transformation Rules > New Transformation Rule

New Transformation Rule

Cancel Save

▼ Details

Name * WidgetTransformations

System * Marketing

Description * Rules for Widget Transformations

ⓘ For Veeva or Vault CRM, ensure that you apply the rules on the following:

- The Target Subscription used for CRM, and
- To the Search and Retrieve API for your CRM integration user

 ⓘ For Widget Integrations, ensure that you apply the rules on the following:

- To the Search and Retrieve API for your system

► NEX Rules

► Apply to Target Subscription

▼ Apply to Search and Retrieve API

Apply Rules to Search and Retrieve API

Apply to Search and Retrieve API calls that use the System

Apply to a Specific User



On the transformation rule configuration, you can apply rules to the Search and Retrieve API calls that use the defined system.

1. Select **Apply to Search and Retrieve API**.
2. Choose **Apply to Search and Retrieve API calls that use the System**.

This will apply the rules to the system defined in the transformation rule configuration.

The system is applied to the API call when widget users download records.

Example widget scenario

The following transformation rules are applied to the system used for a Search widget.

Address rules

- Set Mail Only address types to Inactive
- Limit postal codes to 5 characters

HCP rules

- Uppercase HCP first name
- Uppercase HCP last name

ORDER	OBJECT	FIELD	CODE DESCRIPTION	NEX
	Address	address_status__v	Mail only addresses are inactivated	<pre>if(address_type__v == 'M', 'I', address_status__v)</pre> <p>NEX is valid ▶ Test</p>
	Address	postal_code__v	Postal Code is 5 digits	<pre>if(country__v == 'US', left(postal_code__v,5), postal_code__v)</pre> <p>NEX is valid ▶ Test</p>
	Health Care Professional	first_name__v	Uppercase HCP first name	<pre>uppercase(first_name__v)</pre> <p>NEX is valid ▶ Test</p>
	Health Care Professional	last_name__v	Uppercase HCP last name	<pre>uppercase(last_name__v)</pre> <p>NEX is valid ▶ Test</p>

A user searches for an HCP account, Jack Diamond, in the Search widget.



Jack Diamond has two addresses: one Professional address and one Mail Only address.

Network Search

[← Back to Search Results](#) [Select](#)

Jack Diamond
 #md #npi #physician
 Prescriber, Geriatric Medicine (Internal Medicine)
 3457 Nostrand Ave Brooklyn NY 11229-5131
 No value
 7186306125

Primary Information

Addresses

- 3457 Nostrand Ave Brooklyn NY 11229-5131
Address Type Professional
- 5434 2nd Ave Brooklyn NY 11220-2606
Address Type Mail Only

When the user downloads the record, the data is transformed in the downstream application and in the JSON that is returned.

- HCP first and last name is uppercase
- Postal code is limited to 5 characters
- Mail only address is inactive so it does not display to end users

Downstream application

Verteo BIOPHARMACEUTICALS

Dashboard **Accounts** Reports Announcements Deadlines

JACK DIAMOND

GENERAL INFORMATION

Specialty	Geriatric Medicine (Internal Med...	Degree 1	Doctor of Medicine
HCP Type	Prescriber	Degree 2	No Value
NPI	1831182708	VID	243233568157860871
Gender	Male		

ADDRESSES

- 3457 Nostrand Ave Brooklyn NY 11229 (Primary)

CONTACT

Phone	7186306125	Email	jack.diamond@clemson.edu
-------	------------	-------	--------------------------

JACK DIAMOND
Prescriber

[View Account Details](#)
[Edit Account Details](#)



JSON results

```
▼ entity : {  
  gender__v : M  
  years_in_progress__v : 0  
  birth_year__v : 1947  
  knipper_id__v : 900256611  
  record_owner_type__v : VOD  
  first_name__v : JACK  
  education_level__v : RESIDENCY  
  grad_training__v : Y  
  npi_num__v : 1831182708  
  specialty_3__v : IM  
  record_delta_id__v : 940865729203503103  
  record_owner_name__v : OpenData  
  grad_trg_end_date__v : 1976-06-30  
  place_of_employment__v : 4  
  last_name__v : DIAMOND  
  formatted_name__v : Jack Diamond
```

```
▼ addresses__v : [ 6 items  
  ▼ 0 : {  
    postal_code_primary__v : 11220  
    address_line_1__v : 5434 2nd Ave  
    record_owner_type__v : VOD  
    premise__v : 5434  
    record_owner_name__v : OpenData  
    thoroughfare_trailing_type__v : Ave  
    locality__v : Brooklyn  
    delivery_address__v : 5434 2nd Ave  
    country__v : US  
    premise_number__v : 5434  
    thoroughfare__v : 2nd Ave  
    address_type__v : M  
    delivery_address_1__v : 5434 2nd Ave  
    sub_administrative_area__v : Kings  
    entity_type__v : HCP  
    address_verification_status__v : V  
    address_status__v : I  
    modified_date__v : 2021-05-08T09:12:49.000-07:00  
    record_state__v : VALID  
    postal_code__v : 11220  
    administrative_area__v : US-NY  
    formatted_address__v : 5434 2nd Ave Brooklyn NY 11220-2606
```



Transformation rules list

The Transformation Rules page is updated to display any systems that are applied to the Search and Retrieve API calls for the rules (**API User/System** column).

Transformation Rules						New Rule
Search rules... <input type="text"/>						6 items selected
NAME	SYSTEM	DESCRIPTION	IMPACTED FIELDS	TARGET SUBSCRIPTIONS	API USER/SYSTEM	
CustomerConfig	HealthCloud	Rules	ADDRESS record_state__v PARENTHCO parent_hco_status__v HCP specialty_1__v ADDRESS address_status__v ADDRESS postal_code__v HCP medical_degree_2__v HCP medical_degree_1__v	HealthCloud	N/A	
OneTest	Sutter	Testing	HCP first_name__v	exportdata	N/A	
WidgetTransformations	HealthPortal	Change data	HCP first_name__v PARENTHCO parent_hco_status__v ADDRESS address_status__v ADDRESS postal_code__v HCP last_name__v HCP medical_degree_1__v	healthsystems	HealthPortal	
VCRM	VCRM	Change data	PARENTHCO parent_hco_status__v HCP specialty_1__v ADDRESS address_status__v ADDRESS postal_code__v HCP medical_degree_1__v	VCRM_subscription	admin@verteo.veevanetwork.com	

Widget configurations

A **Transformation Rules** section is added to Search widget and Profile widget configurations so Administrators can see the rules that are applied. This section is read-only.

Network Widgets		Network Widgets > HealthPortal																																				
<ul style="list-style-type: none"> QUICK LINKS Details General Settings Entity Management Transformation Rules Branding Labels 		<div style="text-align: right;"> Cancel Generate Code Save </div> <h2>HealthPortal</h2> <ul style="list-style-type: none"> Details General Settings Entity Management Transformation Rules <p>To apply a transformation rule to your widget, apply the Search and Retrieve API to your widget system. Don't have transformation rules set up? Create a New Transformation Rule</p> <table border="1"> <thead> <tr> <th>OBJECT</th> <th>FIELD</th> <th>DESCRIPTION</th> <th>TRANSFORMATION RULE</th> <th></th> </tr> </thead> <tbody> <tr> <td>ADDRESS</td> <td>address_status__v</td> <td>Mail only addresses are inactivated</td> <td>WidgetTransformations</td> <td>View Rule</td> </tr> <tr> <td>PARENTHCO</td> <td>parent_hco_status__v</td> <td>Ownership Hierarchy in CRM</td> <td>WidgetTransformations</td> <td>View Rule</td> </tr> <tr> <td>ADDRESS</td> <td>postal_code__v</td> <td>Postal Code is 5 digits</td> <td>WidgetTransformations</td> <td>View Rule</td> </tr> <tr> <td>HCP</td> <td>medical_degree_1__v</td> <td>medical degree</td> <td>WidgetTransformations</td> <td>View Rule</td> </tr> <tr> <td>HCP</td> <td>first_name__v</td> <td>Uppercase</td> <td>WidgetTransformations</td> <td>View Rule</td> </tr> <tr> <td>HCP</td> <td>last_name__v</td> <td>uppcase</td> <td>WidgetTransformations</td> <td>View Rule</td> </tr> </tbody> </table>		OBJECT	FIELD	DESCRIPTION	TRANSFORMATION RULE		ADDRESS	address_status__v	Mail only addresses are inactivated	WidgetTransformations	View Rule	PARENTHCO	parent_hco_status__v	Ownership Hierarchy in CRM	WidgetTransformations	View Rule	ADDRESS	postal_code__v	Postal Code is 5 digits	WidgetTransformations	View Rule	HCP	medical_degree_1__v	medical degree	WidgetTransformations	View Rule	HCP	first_name__v	Uppercase	WidgetTransformations	View Rule	HCP	last_name__v	uppcase	WidgetTransformations	View Rule
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Available actions:

- **Create a rule** - Click **Create a New Transformation Rule** to navigate to the Transformation Rules page.
- **Edit a rule** - Click the rule name in the **Transformation Rule** column to open the rule configuration page.
- **View rule** - Click **View Rule** to open a pop-up that displays the object, field, description, and rule name.



NETWORK API

24R1.1

Transformation rules can be applied to the Search and Retrieve calls for your system.

Supported API calls

Example system name = HealthPortal

API	Request
Search API	<code>https://{DNS}/api/version/search?q=john&systemName=HealthPortal</code>
Search API + Supplemental	<code>https://{DNS}/api/version/search?q=john&supplemental={ONE, ALL}&systemName=HealthPortal</code>
Retrieve Entity API	<code>https://{DNS}/api/{version}/entity/{vid_key}?systemName=HealthPortal</code>
Retrieve Child Entity	<code>https://DNS/api/version/child/vid_key?systemName=HealthPortal</code>
Batch Retrieve Entity	<code>https://{DNS}/api/{version}/entities/batch?systemName=HealthPortal</code>
Batch Retrieve Child Entity	<code>https://DNS/api/version/children/batch?systemName=HealthPortal</code>
Retrieve HCO	<code>https://DNS/api/version/hcos/vid_key?systemName=HealthPortal</code>
Retrieve HCP	<code>https://{DNS}/api/{version}/hcps/{vid_key}?systemName=HealthPortal</code>



API	Request
Retrieve Change Request (IncludeEntity=True)	https://{DNS}/api/{version}/change_requests/{change_request_ids}?systemName=HealthPortal
Batch Retrieve Change Request (IncludeEntity=True)	https://DNS/api/version/change_requests/batch?systemName=HealthPortal

EXPORTING CONFIGURATIONS

24R1.1

Transformation rules can now be included in export packages. Add the rules to export package so you can import them on the target environment.

Dependencies

Most of the rule dependencies are added to the export package. This includes the system, custom fields, and custom objects. Integration users that are specified in the rules cannot be included in the export package.

Target subscriptions

When target subscriptions are added to an export package, any applied transformation rules are also included.



Veeva CRM

DCR ATTACHMENTS

24R2

Starting in Veeva CRM version 24R2, Sales reps can add images to DCRs submitted from CRM. For example, you can attach a photo of an HCP's business card or badge to provide supporting evidence of the changes.

The attachments will be pushed to Network through the Network Bridge so Data Stewards can follow-up, validate the changes, and then approve the requests.

Note: This enhancement will be supported in Veeva CRM; it is not yet supported in Vault CRM.

Supported files

Network accepts image file types on DCRs submitted from Veeva CRM.

- **File types** - All image file types are supported.
 - BMP
 - GIF
 - HEIF / HEIC (supported on Apple® devices only)
 - JPG/JPEG
 - PNG
 - TIF/TIFF
- **Number of files** - A maximum of three attachments can be added to each DCR.
- **File size** - 10MB maximum for each file (default).

Network configuration

The option to add attachments on data change requests must be enabled for each object type.

For details, see the [Enable attachments on DCRs](#) topic in the *Veeva Network Online Help*.

Veeva CRM configuration

For the detailed requirements, see the [DCR Attachments](#) topic in the *Veeva CRM Online Help*.



Vault CRM

LICENSE DCRS

24R2

DCRs from Vault CRM to add or update license data are properly mapped between the Vault CRM license fields and Network's license object.

This enhancement is enabled by default in your Network instance.

License mapping

In Vault CRM, licenses are stored as fields on the Address object; in Network, licenses are a separate object.

When address DCRs from Vault CRM include new or changed licenses, the integration maps the license data to the License object in Network. After the DCR is processed in Network, the updated license data is applied to the appropriate addresses in Vault CRM.

This is the same way that License DCRs are mapped for Veeva CRM. It is now supported for Vault CRM.

Supported licenses

License Type	Address Fields Allowed for DCRS in Vault CRM	Applied to Addresses in Vault CRM
State License	license__v license_expiration_date__v	Applied to all addresses for that state on the record
CDS License	cds__v cds_expiration_date__v	Applied to all addresses for that state on the record
DEA License	dea__v dea_expiration_date__v	Applied to specific address (HCP)
State Distributor License (Ohio TDDD)	state_distributor__v state_distributor_expiration_date__v	Applied to a specific address (HCO)

These mappings are automatically configured in the Network Bridge. The mappings cannot be changed.

VAULT CRM BRIDGE - OBJECT TYPES

24R1.1

The Vault CRM Bridge now supports updating multiple object types in Vault CRM. Previously, the Vault CRM Bridge supported only one object type for HCOs and HCPs.

This enhancement is enabled by default in your Network instance. Administrators can map the Network fields to the Vault CRM object type.

Configuration requirements

To support multiple object types, map a Network field to the Vault CRM object type field.



Example mapping

If your Vault CRM has different object types for HCPs, you can map them to Network field values.

Vault Object Type	Network hcp_type__v field value
Prescriber	Prescriber
Prescriber	Resident
Non-Prescriber	Non-Prescribing Health Care Professional
Non-Prescriber	Business Professional
Non-Prescriber	Student

DCR ENHANCEMENTS

24R1.1

Network Administrators can monitor the status of data change request (DCRs) in Vault CRM using the Task Audit History.

ID	TASK ID	ACTION DATE	ACTION TYPE	USER NAME	RELATED ITEMS	MESSAGE	CHANGE REQUEST KEY
611	944759087367720095	2024-05-03 15:14:52 IST	UpdateVaultCRMDCR	System	DCR ID: 944759087367720095 Entity ID: 243230539576771592	DCR V7E00000010002 updated to PE...	164258_V7E00000010002
610	944759087367720095	2024-05-03 15:14:52 IST	UpdateVaultCRMCustomerData	System	DCR ID: 944759087367720095 Entity ID: 243230539576771592	Upsert Account V4T00000019001 succ...	164258_V7E00000010002
609	944759087367720095	2024-05-03 15:14:38 IST	ServiceLog	System	DCR ID: 944759087367720095 Entity ID: 243230539576771592	Created master change request 301944...	164258_V7E00000010002
608		2024-05-03 15:14:38 IST	SubmitDCR	System		DCR Sent to Network API using vaultcm...	164258_V7E00000010002
607		2024-05-03 15:14:38 IST	TransformDCR	System		Mappings read using cyril.asputia@cyrlp...	164258_V7E00000010002
606		2024-05-03 15:14:38 IST	ReceiveDCR	System		Received DCR Message from Vault: DC...	164258_V7E00000010002
605	944759087367720095	2024-05-03 15:14:38 IST	ChangeState	System	DCR ID: 944759087367720095 Entity ID: 243230539576771592	Changed task state from NEW to PENDL...	164258_V7E00000010002
604	944759087367720095	2024-05-03 15:14:38 IST	ServiceLog	System	DCR ID: 944759087367720095 Entity ID: 243230539576771592	Set Change Request status to CHANGE...	164258_V7E00000010002
603	944759087367720095	2024-05-03 15:14:38 IST	CreateTask	Vault CRM Bridge	DCR ID: 944759087367720095 Entity ID: 243230539576771592	Created by sarah.jones@cyrlp.vaultde...	164258_V7E00000010002

This enhancement is enabled by default in your Network instance.

DCR events

All data change request events are logged in the Task Audit History.

An action type is assigned to each event.

Action Type	User Name	Details
CreateTask	VaultCRM	A task was created by <user> in Vault CRM.
ServiceLog	System	A log is generated by Network to indicate a change in the task state.
ChangeState	System	The DCR state was changed.



Action Type	User Name	Details
ReceiveDCR	System	The DCR data was received was Vault CRM.
TransformDCR	System	Mappings were read using <integration user>.
SubmitDCR	System	A DCR was sent to Network API using the Vault CRM Bridge.
UpdateVaultCRMCustomerData	System	The account was upserted to Vault CRM.
UpdateVaultCRMDCR	System	The DCR status was updated in Vault CRM.
Receive Notification	System	A notification of task state change has been resolved.
ResolveTask	System	Task was resolved.
CompleteTask	System	Task was closed.

Event errors

Any errors that occur during the DCR process are also logged in the appropriate events. For example, if an account import to Vault CRM fails during the process, the error displays in the UpdateVaultCRMDCR event.

Task IDs

The Task ID column is blank when the DCR is first received from Vault CRM.

Change request key

The **Change Request Key** column and **Change Request Key** filter are added to the log. A change request key is the global DCR ID that is assigned to each event.

Add the change request key to the filter to view all events for a DCR.

The screenshot shows the 'Task Audit History' interface. On the left, there is a sidebar with various filters, including 'Change Request Key' which is highlighted with a red box and contains the value '164258_v7E000930010002'. The main area displays a table with the following columns: ID, TASK ID, ACTION DATE, ACTION TYPE, USER NAME, RELATED ITEMS, MESSAGE, and CHANGE REQUEST KEY. The table contains 11 rows of data, with the 'CHANGE REQUEST KEY' column populated for all rows. The interface also includes a date range selector (2024-05-02 to 2024-05-03), a 'Get History' button, and an 'Export' button in the top right corner.



API

VERSION UPDATE

24R2

The Network API is updated to v33.0.

The Network API version is updated for every major release. Any additional changes are documented in this section of the Release Notes.

As with all version updates, Integration Users should continue to use v32.0 until there is a change for v33.0 that they want to apply.

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

RETRIEVE FIELD DETAILS METADATA API

24R2

A new property is added to the response to identify fields that are configured as multivalued fields.

Property

```
multivalued
```

Value

- **Reference type fields:** boolean (true/false)
- **All other field types:** null

This property is available in v33.0 and later.

Retrieve Fields Metadata API

The `multivalued` property is added to the response for this API call when it includes the `details=full` parameter and value.