



**veeva** Network

Veeva Network 25R2.1 Early Release Notes

September 2025



## Contents

<b>About these Release Notes .....</b>	<b>5</b>
Release dates .....	5
Subscribe to release notifications .....	5
Software releases and maintenance .....	5
Release Notes and Data Governance documents .....	5
<b>Browser requirements .....</b>	<b>5</b>
<b>What's new.....</b>	<b>6</b>
Data Governance.....	7
<b>Announcements.....</b>	<b>8</b>
Add request match rules .....	8
Custom match rules.....	8
<b>Network widgets.....</b>	<b>9</b>
Multivalued reference fields .....	9
Hierarchy Explorer widget .....	9
Search widget .....	10
API support .....	12
<b>Hierarchy Explorer widget.....</b>	<b>13</b>
Feature message .....	13
Hierarchy Explorer tabs.....	14
Key highlights.....	14
Supported users.....	14
Create a hierarchy tab .....	15
Manage tabs .....	17
Hierarchy Explorer search .....	18



Logs.....	18
Editing hierarchies.....	19
Benefits.....	19
Key highlights.....	19
Enable editing.....	19
Enable editing for hierarchies.....	20
Add affiliations.....	21
Remove relationships from the hierarchy.....	24
Edit relationships.....	26
Editing account profiles.....	27
Enable editing.....	27
Edit an account.....	28
Include relationship fields.....	29
Supported fields.....	29
Add fields.....	30
<b>Data change requests.....</b>	<b>31</b>
DCR approval rules for suspect match tasks.....	31
About DCR approval rules.....	31
Supported objects for suspect match rules.....	31
Process for defining DCR approval rules.....	32
Create a rule for suspect match tasks.....	32
DCR approval Rules page.....	35
<b>Reports.....</b>	<b>36</b>
Job impact dashboard.....	36
Test queries.....	36



<b>Data model .....</b>	<b>38</b>
Common Data Architecture (CDA) .....	38
Supported countries .....	38
Veeva ID and VID fields .....	38
View Veeva ID on record profiles .....	39
Veeva ID field updates .....	39
Cluster codes for Germany .....	39
New cluster version .....	39
Update addresses .....	39
<b>Match .....</b>	<b>40</b>
Match summary .....	40
Supported features .....	40
<b>Target subscriptions .....</b>	<b>41</b>
Include header row in empty export files .....	41
Include header rows on empty files .....	41
Existing configurations .....	41
<b>Vault CRM integration .....</b>	<b>42</b>
Vault CRM Bridge record counts .....	42
Job details .....	42
Report on upserted records .....	43
<b>Logs .....</b>	<b>46</b>
Identify searches from China CRM .....	46
Search origin .....	46
View China CRM searches in the log .....	46



## About these Release Notes

---

These Release Notes describe all features that will be included in Veeva Network 25R2.1.

### RELEASE DATES

- **Sandbox release** (version 25R2.1) - Friday, September 26
- **Production release** (version 25R2.1.1) - Friday, October 10

### 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 Network Online Help](#)

For more release 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.



## What's new

The following key enhancements comprise the Veeva Network 25R2.1 minor release.

		ST	DS	DM	AD
<b>Announcements</b>					
Add Request Match Rules	The default match rules used by add requests will be updated for countries in Latin America in version 25R3.0.				
<b>Network Widgets</b>					
Multivalued fields	Reference fields containing multiple values are supported for the Search widget and Hierarchy Explorer.				
<b>Hierarchy Explorer Widget</b>					
Feature message	A message displays if the Hierarchy Explorer widget is not enabled for your instance.				
Create tabs	Widget users can create tabs on the homepage to organize hierarchy data into relevant categories.				
Edit hierarchies	Business users can now manage affiliations directly within the widget.				
Edit account profiles	Business users can make changes to accounts within the widget.				
Include relationship details	Relationship fields can be added to HCO and HCP account details.				
<b>Data change requests</b>					
DCR Approval Rules	Approvals rules can now be applied to suspect match tasks.				
<b>Reports</b>					
Job Impact Dashboard	Queries can be tested on dashboard tiles to ensure they contain the desired result.				
<b>Data Model</b>					
CDA data model	The Veeva ID (veevaid__v) field is now enabled by default in all Network instances.				
Cluster management	Updated cluster codes are available for Germany.				
<b>Match</b>					
Match summary	The <b>Match Summary</b> section for job details now contain match statistics as percentages (%)				



		ST	DS	DM	AD
<b>Target subscriptions</b>					
Header rows on empty files	Header rows can now be included on files that are exported with no data.			●	●
<b>Vault CRM integration</b>					
Vault CRM Bridge	The job details for the Bridge now contain counts for records that were upserted but were unchanged.			●	●
<b>Logs</b>					
Searches from China CRM	Administrators can identify searches originating from China CRM from the Search Audit History.				●

**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* document for every minor and major Network release.



## **Announcements**

---

### **ADD REQUEST MATCH RULES**

In version 25R3.0, updates will be made to the default match rules used by add requests. The rules will be modified to reduce the potential for over matching for HCPs and HCOs.

Changes will be made for countries in the Latin America region.

### ***Custom match rules***

If you have made changes to the default match rules, these updates will not impact your custom rules.





## Network widgets

### MULTIVALUED REFERENCE FIELDS

Reference fields containing multiple values are supported for Hierarchy Explorer and the Search widget.

These enhancements are enabled by default.

For information about these fields, see Multivalued reference fields in the *Veeva Network Online Help*.

### *Hierarchy Explorer widget*

Multivalued field display on HCP and HCO accounts in the hierarchy. They can also be used to filter the hierarchy to find specific accounts.

### Prerequisite

To use multivalued fields in Hierarchy Explorer, they must be added to the Hierarchy Index file. Contact Veeva Support to add the fields.

**Mayo Clinic**  
200 1st St SW Ste SI123 Rochester MN 55905-5000

All Specialties (CDA): Cardiology x Apply Filter

Child HCOs (Direct 5 | Total 6) Ancestor HCOs (Parents 0 | Total 0) Child HCPs (Direct 0 | Total 1) Summary View

Health Care Professionals	HCP Type	MVR Therapeutic area	All Specialties (CDA)
<input type="checkbox"/> <b>Daniel Kincaid</b> #md #npi #physician #primarycare Mayo Clinic Health System Eau Claire 1400 Bellinger St Fl 2 Eau Claire WI 54703	Prescriber	Neurology, Oncology	Cardiology, Internal Medicine



## Search widget

Multivalued fields are supported in the Advanced search form, as filters, and they display on account profiles.

### Advanced Search form

Widget users can use the fields to search for HCP and HCO accounts.

**Search Accounts**

**Health Care Professionals** **Health Care Organizations**

**NAME**

First Name

Last Name

ID

Parent Corporate Name

[IDs Available to Search](#)

Hashtags

**LOCATION**

City

Zip/Postal Code

**MVR Therapeutic area**

-

Search

-

Cardiology

Neurology

Oncology

[Clear All Filters](#) **Search**

**Note:** Administrators must add the field to the **Advanced Search Field Selection** in the widget configuration. For details, see [Configure a search widget](#) in the *Veeva Network Online Help*.



## Filter on fields

The search results can be filtered using a multivalued field.

The screenshot shows the 'Search Accounts' interface. At the top, there's a header 'Search Accounts'. Below it, a link '< Back to Search' and a '+ Create New' button. The main section shows '2 Search Results for Health Care Professionals'. Filters are applied: 'Country: United States' and 'MVR Therapeutic area: Oncology'. A sidebar on the left has 'Parent Corporate Name' and 'Hashtags' fields. The 'MVR Therapeutic area' dropdown is highlighted with a red box, showing 'Oncology' selected, with 'Neurology' and 'Cardiology' as options. The main results area shows two profiles: Maria Lopez (Prescriber | Ophthalmology | Doctor of Medicine) and Cooper Ma (Prescriber | Cardiovascular Disease | Doctor of Medicine). Both profiles have tags like #accupunc, #cda, #md, and #physician.

## View account profiles

Multivalued fields display on account profiles in the widget.

The screenshot shows the 'View account profile' interface for Cooper Ma. The header 'Search Accounts' is at the top. Below it, a link '< Back to Search Results' and an information icon. The profile card shows Cooper Ma's name, a profile picture, and tags #cda, #md, and #physician. His role is 'Prescriber, Cardiovascular Disease' and his contact info is 'CoooperMa@YAHOO.COM' and '7158385222'. Below the profile card, the 'Profile Information' section is expanded, showing 'Primary Information'. It includes fields for Name (Cooper Ma), VID (243230465085932545), HCP Type (Prescriber), and Gender (Male). At the bottom, there are two multivalued fields: 'All Specialties (CDA)' with 'Cardiology' and 'Internal Medicine' selected, and 'MVR Therapeutic area' with 'Neurology' and 'Oncology' selected. These fields are highlighted with a red box.

The fields cannot be edited on account profiles.



### ***API support***

Integration users can view labels for multivalued fields when the Enriched Results flag is used in the Search and Retrieve Entity API.

#### **Example**

Multiple labels display for the All Specialties CDA field.

```
"all_spec_cda__v": "cd,im",  
  "all_spec_cda__v_value__u": [  
    "Cardiology",  
    "Internal Medicine"  
  ]
```

This is supported for Network API version 36.0.

For details about the Enriched Results flag, see the [Search widget](#) topic in the *Veeva Network Developer Help*.



## Hierarchy Explorer widget

---

The following enhancements have been added for the Hierarchy Explorer widget in this release.

### FEATURE MESSAGE

Hierarchy Explorer is a Network widget that you can use to see all levels of an HCO's structure, making it easy to visualize their hierarchy and find new targets.

The widget is not available by default.

If Hierarchy Explorer is not enabled in your Network instance, a message displays when you try to add the widget:

Hierarchy Explorer Widget is not available. Please contact Network support to enable this widget.

**New Network Widget** ✕

Select the type of widget \*

Hierarchy Explorer Widget ▼

An embeddable widget that displays an hierarchy of health systems

⚠ Hierarchy Explorer Widget is not available. Please contact Network support to enable this widget.

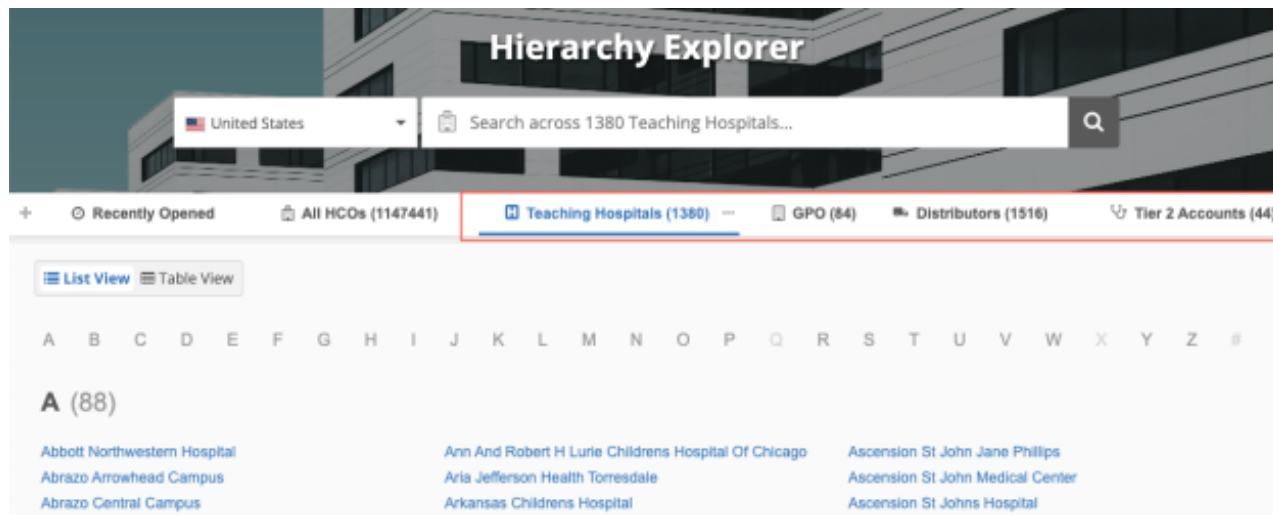
Cancel Create Widget

For more information, see [Enable the widget](#) in the *Veeva Network Online Help*.



## HIERARCHY EXPLORER TABS

Widget users can create tabs on the homepage to organize segments of data. Previously, Administrators had to create multiple widgets for each of the data segments their users wanted to access (for example, hospitals, IDNs, Pharmacies).



This enhancement is enabled by default. Tabs can be created by any user.

### Key highlights

- Tabs can be created to filter on segments of data.
- Tabs can be specific to countries or available to all countries.
- Administrators and Data Managers can create private tabs and public tabs for all users.
- All users can create private tabs.

### Supported users

All Network user can create tabs in the widget.

User Type	Create Private Tab	Create Public Tab
Portal User	●	
Standard User	●	
Data Steward	●	
Data Manager	●	●
System Administrator	●	●
System and Data Admin	●	●



### Create a hierarchy tab

To create a tab:

1. On the Hierarchy Widget homepage, click the Add (+) icon.

**New Tab**

**Name**

Children's Hospitals

**Icon**

Hospital

**Available To**

☐ Just Me

☒ All Users

**Countries**

☐ All Countries

☒ Specific Countries

United States

**Filters**

FILTER	VALUE		
HCO Major Class of Trade	Hospitals	AND	X
HCO Specialty 1	46 items selected pediatrics Select All 18 / 18 ✓ Acute Care Pediatrics (APNs or Only) ✓ Adolescent Medicine (Pediatrics) ✓ Child Abuse Pediatrics		X

Cancel Save

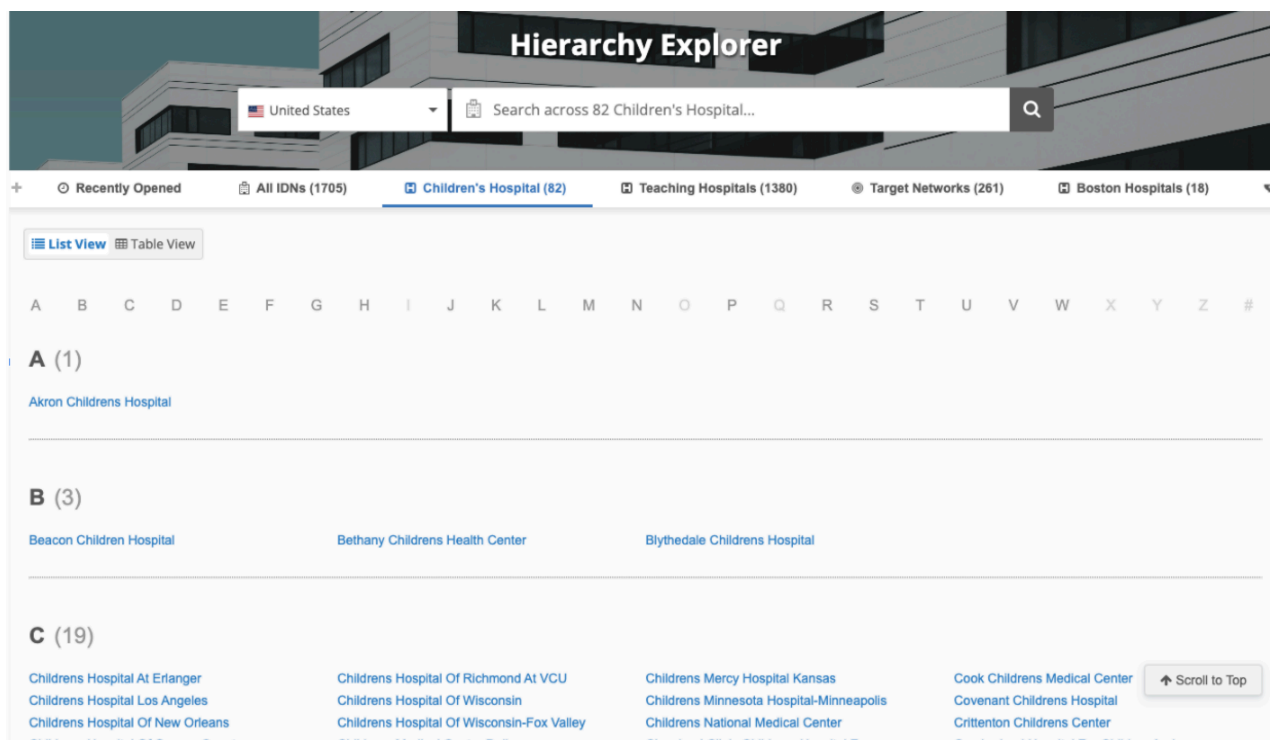
2. On the **New Tab** dialog, define a meaningful **Name**. The name will display to all users that can access the tab.

Names can contain a maximum of 25 characters.

3. **Icon** - Expand the list and choose an appropriate icon.



4. **Available to me** - Define who can access the tab.
  - **Just Me** - The tab is private. No other users can access the tab.
  - **All Users** - The tab is public. All users with access to the widget can view.  
Displays only for Administrators and Data Managers.
5. **Countries** - Define the countries for the tab. Users can access the tab if they have a data visibility profile for that country.
  - **All Countries**
  - **Specific Countries** - Choose from the list of countries defined for the widget.
6. **Filters** - Define the field and value to use to segment the accounts.  
Filters are limited to the fields included in the Hierarchy Explorer index file. HCO fields and Address fields are supported.
7. **Save** your changes.  
The tab displays on the widget homepage. A count of records displays beside the tab name.

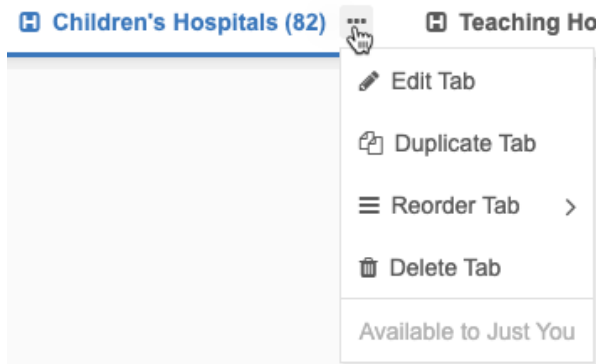






## Manage tabs

Hover over the tab name and click the **More (...)** icon to open the tab options.



The actions that display depend on the type of tab (public or private) and your user type.

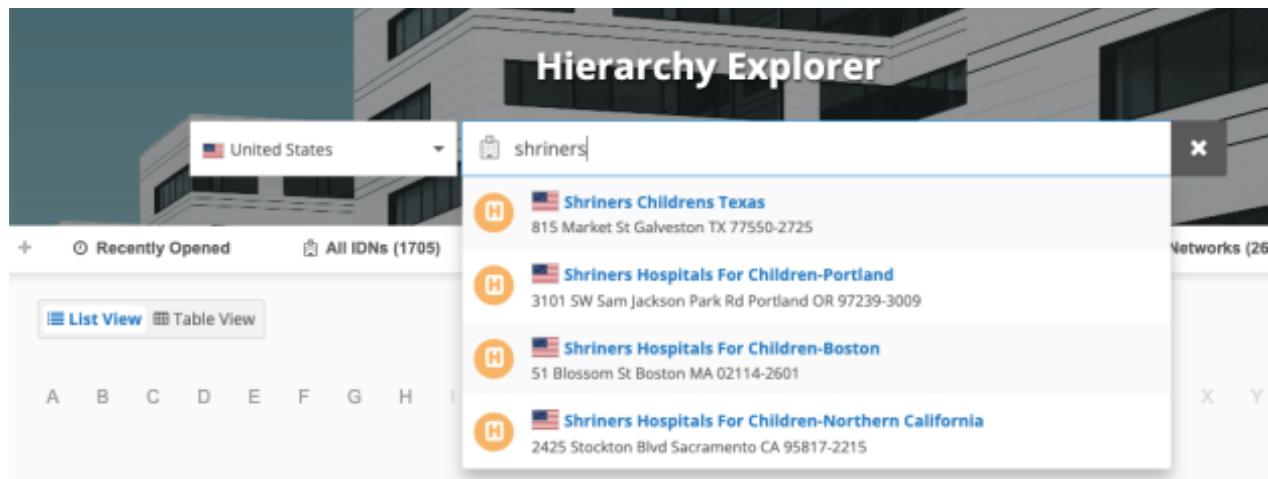
Action	Description	Key Details
<b>Edit tab</b>	Edit any of the details on the tab.	Private tabs can be promoted to public tabs only by the creator. Public tabs can be demoted to private only by the creator. Standard users cannot edit public tabs.
<b>Duplicate tab</b>	Make a clone of the tab to include all of the copied settings.	
<b>Reorder tab</b>	Move the tab to a different position. <ul style="list-style-type: none"><li>• Move Right</li><li>• Move Left</li><li>• Move First</li><li>• Move Last</li></ul> <b>Tip:</b> You can drag and drop a tab to any position.	The <b>Recently Opened</b> tab cannot be moved. New tabs created by Administrators display immediately after the <b>Recently Opened</b> tab. Reordering tabs does not impact other users. The order is specific to each user.
<b>Delete tab</b>	Remove the tab from the widget.	

A message at the bottom of the menu identifies if the tab is private (**Available to just you**) or public (**Available to Everyone**).



### *Hierarchy Explorer search*

Searching for an HCO on the homepage respects the tab that you are on when you search.



### *Logs*

Administrators can track changes to the Hierarchy Explorer widget tabs in the **System Audit History**.

Tracked changes:

- Add private and public tabs.
- Update private and public tabs



## EDITING HIERARCHIES

Business users can now add, remove, and edit affiliations directly within the Hierarchy Explorer widget.

The screenshot displays the Veeva Hierarchy Explorer interface for Sutter Health. At the top, there's a header with the organization name and address. Below this, a navigation bar includes tabs for 'All Hierarchies', 'Ownership Hierarchy', 'Sales Hierarchy', 'Neurology Hierarchy', and 'Oncology Hierarchy'. A '+ Apply Filter' button is also present. The main content area shows a list of hierarchies. The 'Child HCOs' tab is selected, showing a list of organizations. A red box highlights the '+ Add Affiliation' button in the top right corner. Another red box highlights a context menu for the 'Apex Medical Group Inc.' entry, which includes options: 'Add Child HCO', 'Edit Affiliation', 'Remove Affiliation', and 'Edit Profile'.

Health Care Organization	Level	Roll-Ups	HCO Type	Major Class												
<b>Apex Medical Group Inc.</b> #npi #pediatrics #primarycare 311 W I St Los Banos CA 93635-3479	Level 1	<table border="1"><thead><tr><th colspan="2">HCO</th><th colspan="2">HCP</th></tr><tr><th>DIRECT</th><th>TOTAL</th><th>DIRECT</th><th>TOTAL</th></tr></thead><tbody><tr><td>-</td><td>-</td><td>1</td><td>1</td></tr></tbody></table>	HCO		HCP		DIRECT	TOTAL	DIRECT	TOTAL	-	-	1	1	Organization, Group at Hospital	Medical Group
HCO		HCP														
DIRECT	TOTAL	DIRECT	TOTAL													
-	-	1	1													
<b>Associated Internal Medicine</b> #endo #groupPractice #npi #rheumatology	Level 1	<table border="1"><thead><tr><th colspan="2">HCO</th><th colspan="2">HCP</th></tr><tr><th>DIRECT</th><th>TOTAL</th><th>DIRECT</th><th>TOTAL</th></tr></thead><tbody><tr><td>-</td><td>-</td><td>1</td><td>1</td></tr></tbody></table>	HCO		HCP		DIRECT	TOTAL	DIRECT	TOTAL	-	-	1	1	Organization, Group Practice	Medical Group
HCO		HCP														
DIRECT	TOTAL	DIRECT	TOTAL													
-	-	1	1													

This enhancement is available by default. Administrators can enable editing for the widget and for specific hierarchies.

### Benefits

- **Easily add accounts to the hierarchy** - Add accounts to any level of the hierarchy. Previously, you had to jump to different accounts to find the correct affiliation.
- **Simplify custom hierarchy management** - Business users can edit custom hierarchies directly within the widget, streamlining the management process.

### Key highlights

- Editing can be enabled for specific hierarchies.
- Add accounts or remove accounts in any level of the hierarchy.
- Edit relationships and accounts.
- Make the changes directly within the hierarchy view to understand the impact.
- Preview the changes as drafts before committing them.
- Submit DCRs against the hierarchy directly from the widget.

### Enable editing

Administrators can enable editing in the Hierarchy Explorer widget configuration.

1. In the Admin console, click **Widgets & Portal > Network Widgets**.
2. Select a Hierarchy Explorer configuration.
3. In the **Editing Options** section, select **Enable Editing**.



## Enable editing for hierarchies

When editing is enabled for Hierarchy Explorer, it is available by default for the following hierarchies:

- All Hierarchies
- Ownership Hierarchy

## Enable editing for custom hierarchies

To enable editing in the widget for custom hierarchies:

1. In the Admin console, click **Data Model > Hierarchy Management**.
2. On the Hierarchy Management page, select a hierarchy.
3. In the **Editing Options** section, select **Enable Editing for this hierarchy**.

Hierarchy Management > Oncology Hierarchy

### Oncology Hierarchy

Cancel Save

▼ Editing Options

☒ Enable Editing for This Hierarchy

Define default values for hierarchy changes (applied to Hierarchy Explorer).

**ADD TO HIERARCHY**

Define the default values when a new relationship is created in the hierarchy. The parenthco relationship status is set to Active for new relationships created automatically.

**HCO-HCO**

FIELD	VALUE
Oncology Hierarchy	Yes/True

+ Add Field

**HCP-HCO**

FIELD	VALUE
Oncology Hierarchy	Yes/True

+ Add Field

4. **Add to Hierarchy / Remove from Hierarchy** - Define the default field values that will be included in the DCR when users add or remove affiliations in the widget.

For example, set the **Oncology Hierarchy** field to `Yes/True` and the **Relationship Type** field value to `Affiliation` when users add HCO-HCO relationships.

Define the fields for **HCO-HCO** and **HCP-HCO** relationships.



### Supported fields

- Reference fields that are included in the Hierarchy Index file.

System fields and the Hierarchy Type field does not display.

**Note:** When a new affiliation is added, the **Parent HCO Status** field is set to **Active** by default.

5. **Save** your changes.

### Example

Set the default value for the **Oncology Hierarchy** field to **Yes/True** when users add an HCO-HCO affiliation in the Hierarchy Explorer widget.

New Affiliation: All Hierarchies

**New Affiliation**  
Johnston Memorial Hospital is being **added** to Alta Bates Summit Medical Center-Alta Bates Campus under All Hierarchies.

**Oncology Hierarchy**  
Yes/True

**Notes**  
The changes you have made require approval. Please provide additional information to explain the changes.

Discard Save as Draft Submit

### Add affiliations

If editing is enabled for the hierarchy, affiliations can be added at any level of the hierarchy.

1. Affiliations can be added using the following methods:
  - On the **Child HCOs** or **Child HCPs** tab, click **Add Affiliation**.

Hierarchy Explorer > Sutter Health

Sutter Health  
2200 River Plaza Dr Sacramento CA 95833-4134

All Hierarchies Sales Hierarchy Ownership Hierarchy Neurology Hierarchy Oncology Hierarchy + Apply Filter

Child HCOs (Total 76) Ancestor HCOs (Total 0) Child HCPs (Total 96) Summary View Export to Excel + Add Affiliation

Health Care Organization Level Roll-Ups HCO Type

This creates a Level 1 affiliation.



- On the **Child HCOs** tab, click the **More** icon beside an HCO name and select **Add Child HCO**.

Child HCOs ( Direct 54 | Total 78 ) Ancestor HCOs ( Parents 0 | Total 0 )

Health Care Organization	Level
Alta Bates Summit Medical Center-Alta Bates Campus #hospital #npi 2450 Ashby Ave Berkeley CA 94705-2067	Level 1
Alta View Hospitalists #emergency #groupPractice 9660 S 1300 E Sandy UT 84094-3762	Level 2
Altamonte Springs Intern...	Level 2

- A row is created in the hierarchy. Begin typing the affiliation name in the Search field.

HCO	HCP	Organization, Hospital
TOTAL 3	DIRECT 2 TOTAL 5	
HCO	HCP	Organization, Group at Hospital
TOTAL -	DIRECT 1 TOTAL 1	
HCO	HCP	Organization, Group Practice
TOTAL -	DIRECT 1 TOTAL 1	

Results begin displaying accounts from your Network instance that match the keywords.

- Select an HCO/HCP to add as an affiliation.
- The HCO/HCP is added as a row on the tab. The **Draft** icon displays beside the account name.

Child HCOs ( Total 76 ) Ancestor HCOs ( Total 0 ) Child HCPs ( Total 96 ) Summary View Export to Excel + Add Affiliation

Health Care Organization	Level	Roll-Ups	HCO Type				
DRAFT Barton Memorial Hospital #npi #hospital 2170 South Ave South Lake Tahoe CA 96150-7026	Level 1	<table border="1"> <thead> <tr> <th>HCO</th> <th>HCP</th> </tr> </thead> <tbody> <tr> <td>DIRECT - TOTAL -</td> <td>DIRECT 1 TOTAL 1</td> </tr> </tbody> </table>	HCO	HCP	DIRECT - TOTAL -	DIRECT 1 TOTAL 1	Organization, Hospital
HCO	HCP						
DIRECT - TOTAL -	DIRECT 1 TOTAL 1						

Available actions:

- Submit** - Click to send a DCR so the affiliation can be added to the account.
- Delete** - Click the **Trash** icon to remove the draft affiliation.



5. If you click **Submit**, the **New Affiliation** dialog displays.

**New Affiliation: All Hierarchies**

**New Affiliation**  
Barton Memorial Hospital is being added to Sutter Health under All Hierarchies.

**Oncology Hierarchy**  
No/False

**Relationship Type**  
-

**Notes**  
The changes you have made require approval. Please provide additional information to explain the changes.

Discard

Save as Draft

Submit

Add the following details:

- **Fields** - Add or change the field values that will be included on the DCR.
- **Notes** - Add details to help the affiliation changes to be quickly approved.

Available actions:

- **Submit** - Click to send a DCR so the affiliation can be added to the account.
- **Save as Draft** - Click to keep the affiliation as a draft change.  
Drafts are temporary. It is removed when you leave or refresh the page.
- **Delete** - Click the **Trash** icon to remove the draft affiliation.

6. If you submitted the change, a DCR is created.

The HCO/HCP remains highlighted in green and displays a **Pending Review** icon. Click the icon to display details and the task ID.

<input type="checkbox"/>	Health Care Organization	Level	Roll-Ups	HCO Type
	<b>Barton Memorial Hospital</b> #npi #hospital 2170 South Ave South Lake Tahoe CA 96150-7026	Level 1	HCO	Organization
			HCP	TOTAL 1

New Affiliation Submitted, Pending Review

**Submitted By:** bob.smith@verteo.veevanetwork.com

**Date:** 2025-09-08 14:17:17

**Task ID:** 947551560607141023



## Remove relationships from the hierarchy

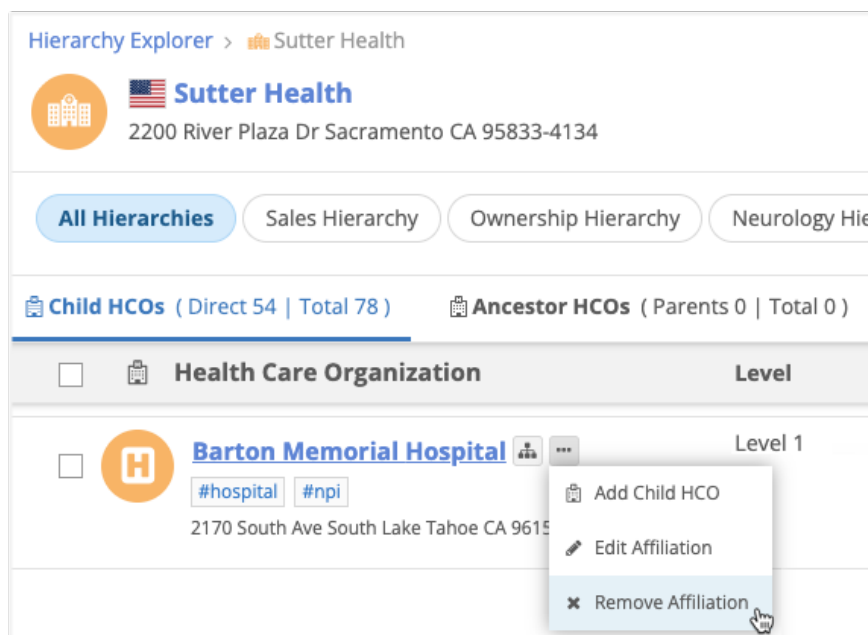
Business users can remove HCO-HCO and HCP-HCO relationships.

To remove a relationship:

1. **HCO-HCO relationship** - On the **Child HCOs** tab, click the **More** icon beside an HCO name and select **Remove Affiliation**.

or

**HCP-HCO relationship** - On the **Child HCPs** tab, click the **More** icon beside an HCP name and select **Remove Affiliation**.



2. The **Remove Affiliations** dialog confirms that the affiliation is being removed from the focused HCO.

The relationship status field will be changed from Active to Inactive according to the rules defined in the hierarchy configuration.





Available actions:

3. If you submitted the change, a DCR is created and sent to Network.

Hierarchy Explorer > Sutter Health

**Sutter Health**

2200 River Plaza Dr Sacramento CA 95833-4134

All Hierarchies
Sales Hierarchy
Ownership Hierarchy
Neurology Hierarchy
Oncology Hierarchy
+ Apply Filter

Child HCOs (Total 78)
Ancestor HCOs (Total 0)
Child HCPs (Total 98)
Summary View
Export

Health Care Organization	Level	Roll-Ups
<b>Barton Memorial Hospital</b> <div> #hospital #npi </div> 2170 South Ave South Lake Tahoe CA 96150-7026	Level 1	<div> <div>Affiliation Removed, Pending Review</div> <div>Submitted By: bob.smith@verteo.veevanetwork.com</div> <div>Date: 2025-09-08 21:50:59</div> <div>Task ID: 947553344620858527</div> </div> <div>TOTAL 1</div>

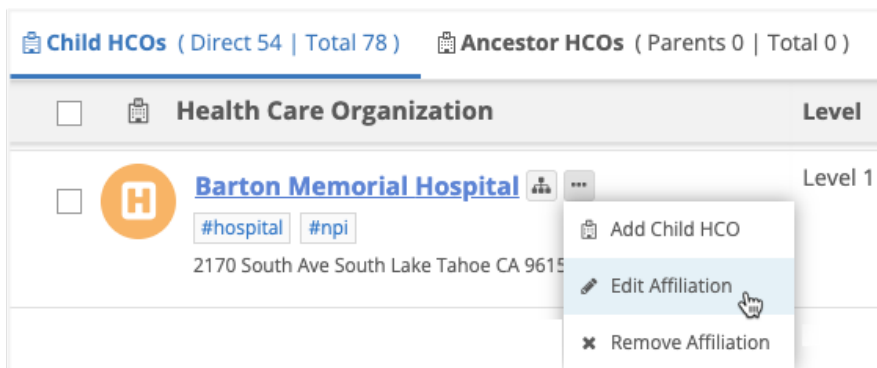
The relationship will be removed if the DCR is approved.



## Edit relationships

Business users can edit HCO-HCO and HCP-HCO relationships.

1. **HCO-HCO relationship** - On the **Child HCOs** tab, click the **More** icon beside an HCO name and select **Edit Affiliation**.  
or  
**HCP-HCO relationship** - On the **Child HCPs** tab, click the **More** icon beside an HCP name and select **Edit Affiliation**.



2. On the **Edit Affiliation** dialog, define the following details:
  - **Fields** - Add or change the field values that will be included on the DCR.
  - **Notes** - Add details to help the affiliation changes to be quickly approved.

The 'Edit Affiliation' dialog box has a title bar 'Edit Affiliation'. Below it, the text says 'You are editing the affiliation between Sutter Health and Barton Memorial Hospital.' There are two dropdown menus: 'Oncology Hierarchy' with 'Yes/True' selected, and 'Relationship Type' with 'Ownership' selected. Below these is a 'Notes' section with the text 'The changes you have made require approval. Please provide additional information to explain the changes.' and a text area containing 'Updated relationship between Sutter and Barton.' At the bottom, there are two buttons: 'Discard' and 'Submit'.

Available actions:

- **Discard** - Click to return to the hierarchy without removing the affiliation.
- **Submit** - Click to continue to remove the affiliation.



3. If you submitted the change, a DCR is created and sent to Network. The HCO remains highlighted in yellow and displays a yellow **Pending Review** icon. Click the icon to display details and the task ID.

The screenshot shows the 'Sutter Health' profile page. At the top, there's a header with the organization name and address. Below that are tabs for 'All Hierarchies', 'Sales Hierarchy', 'Ownership Hierarchy', 'Neurology Hierarchy', and 'Oncology Hierarchy'. A summary bar shows 'Child HCOs (Total 78)', 'Ancestor HCOs (Total 0)', 'Child HCPs (Total 98)', and a 'Summary View' button. The main table lists 'Health Care Organization' with columns for 'Level' and 'Roll-Ups'. The entry for 'Barton Memorial Hospital' is highlighted in yellow. A yellow 'Pending Review' icon is visible next to the hospital name. A tooltip is displayed over the icon, containing the following text: 'Affiliation Edited, Pending Review', 'Submitted By: bob.smith@verteo.veevanetwork.com', 'Date: 2025-09-08 23:43:33', and 'Task ID: 947553787295829151'.

If the DCR is approved, the affiliation will be updated.

## EDITING ACCOUNT PROFILES

Business users can now edit accounts within Hierarchy Explorer. Changes are submitted as DCRs.

The screenshot shows the 'Hierarchy Explorer' widget. It displays a list of 'Child HCOs' (Direct 55 | Total 80) and 'Ancestor HCOs' (Parents C). The main table lists 'Health Care Organization' with columns for 'Level' and 'Roll-Ups'. The entry for 'Alta Bates Summit Medical Center-Alta Bates Campus' is highlighted. A dropdown menu is open next to the hospital name, showing options: 'Add Child HCO', 'Edit Affiliation', 'Remove Affiliation', and 'Edit Profile'. The 'Edit Profile' option is highlighted with a red box and a hand cursor.


### Enable editing

Administrators can enable editing in the Hierarchy Explorer widget configuration.

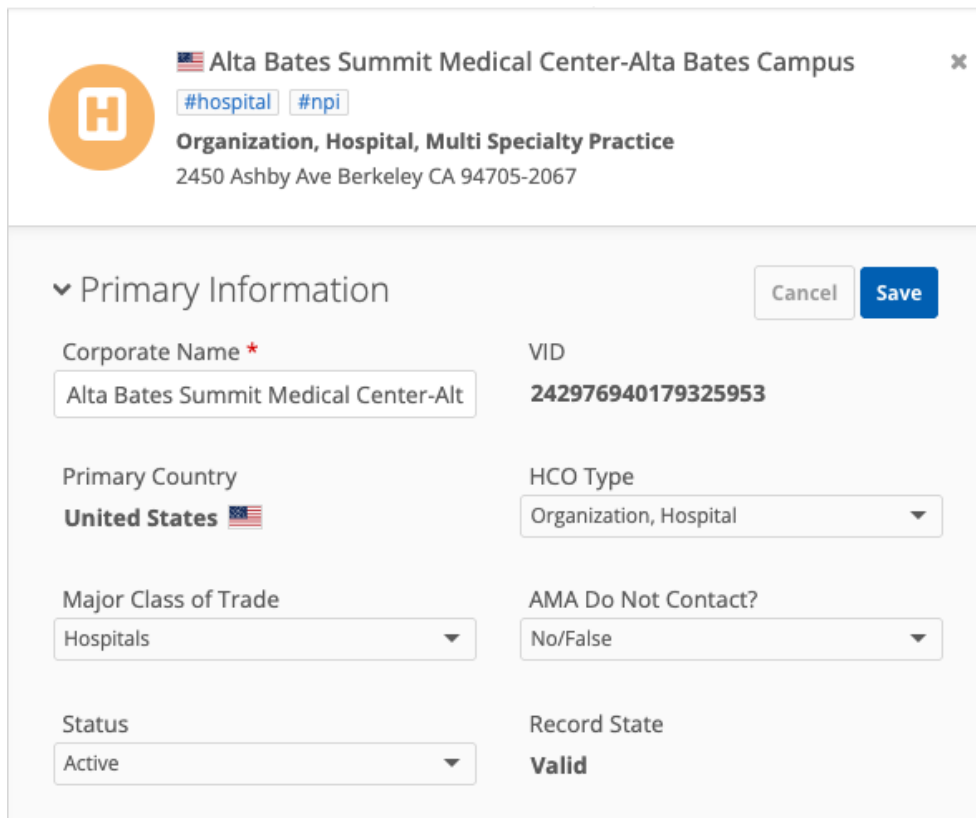
1. In the Admin console, click **Widgets & Portal > Network Widgets**.
2. Select a Hierarchy Explorer configuration.
3. In the **Editing Options** section, select **Enable Editing**.




### Edit an account


1. On the **Child HCOs** or **Child HCPs** tab, click the **More** icon  beside an HCO/HCP name and select **Edit Profile**.

The profile opens in edit mode.



 **Alta Bates Summit Medical Center-Alta Bates Campus** ✕  
 #hospital #npi  
**Organization, Hospital, Multi Specialty Practice**  
 2450 Ashby Ave Berkeley CA 94705-2067

▼ **Primary Information** Cancel Save

Corporate Name *	VID
Alta Bates Summit Medical Center-Alt	<b>242976940179325953</b>
Primary Country	HCO Type
<b>United States</b> 	Organization, Hospital ▼
Major Class of Trade	AMA Do Not Contact?
Hospitals ▼	No/False ▼
Status	Record State
Active ▼	<b>Valid</b>

2. Make any required changes to the account information, addresses, or licenses.

**Note:** Affiliations cannot be edited or removed on the account profile. The **Parent Affiliations** section is hidden in edit mode.

3. **Save** your changes.
4. The **Confirm Changes** dialog displays the fields that were changed. Click **Submit**.



**Confirm Changes for Alta Bates Summit Medical Center-Alta Bates Campus** ✕

The changes you have made may require approval. Please provide additional information to explain the changes.

**Notes**

**Summary of Changes: Alta Bates Summit Medical Center-Alta Bates Campus**


FIELD NAME	CURRENT VALUE	NEW VALUE
Custom Fields		
Tier		TIER1

Cancel Submit

A DCR will be routed to the record owner process the change.

## INCLUDE RELATIONSHIP FIELDS

Administrators can include relationship fields for accounts to provide more details about their affiliations. Previously, only fields for HCOs and HCPs were supported on the respective account. Now you can add parent HCO fields, for example, you can add **Relationship Type** and **Record Owner Type** fields.



Sutter Health

2200 River Plaza Dr Sacramento CA 95833-4134

All Hierarchies

Sales Hierarchy

Ownership Hierarchy

Neurology Hierarchy

Oncology Hierarchy

+ Apply Filter

Child HCOs (Direct 55 | Total 80)





Ancestor HCOs (Parents 0 | Total 0)

Child HCPs (Direct 42 | Total 102)

Summary View

Export to Excel

+ Add Affiliation

<input type="checkbox"/>  Health Care Organization	Oncology Hierarchy %	Relationship Type %	Record Owner Type %	
<div><div><input checked="" type="checkbox"/></div><div><div><div><div>Alta Bates Summit Medical Center-Alta Bates Campus</div><div>#hospital #npi</div><div>2450 Ashby Ave Berkeley CA 94705-2067</div></div></div></div></div>	Practice	No/False	Ownership	OpenData
<div><div><input type="checkbox"/></div><div><div><div><div>Apex Medical Group Inc</div><div>#npi #pediatrics #primarycare</div><div>311 W I St Los Banos CA 93635-3479</div></div></div></div></div>	Primary Care Practice	No/False	Ownership	OpenData
<div><div><input type="checkbox"/></div><div><div><div><div>Barton Memorial Hospital</div><div>#hospital #npi</div></div></div></div></div>	Practice	No/False		Locally Managed

## Supported fields

Reference fields can be added as fields.

**Note:** The fields must be included in the Hierarchy Index file. Contact Veeva Support to add the fields to the file.



## Add fields

1. In the Admin console, click **Widgets & Portal > Network Widgets**.
2. Select a Hierarchy Explorer configuration.
3. In the **Additional Fields Displayed** section a heading is added for **Additional ParentHCO Fields**.

Fields can be added for HCO-HCO and HCP-HCO relationships.

4. Click **Add HCO-HCO Field**.
5. Select a field.

A maximum of three fields can be added for each relationship.

6. **Save** your changes.

**ADDITIONAL PARENTHCO FIELDS**  
Define which additional ParentHCO fields you want to display (up to 3).

**HCO-HCO**

≡	Oncology Hierarchy	▼	×
≡	Relationship Type	▼	×
≡	Record Owner Type	▼	×

**HCP-HCO**

≡	Oncology Hierarchy	▼	×
≡	Record Owner Type	▼	×

[+ Add HCP-HCO Field](#)



## Data change requests

### DCR APPROVAL RULES FOR SUSPECT MATCH TASKS

Administrators can now apply DCR approval rules to suspect match tasks. The rule is triggered if either the winning or losing record meets the rule criteria.

DCR Approval Rules

DCR Approval Rules

Your changes has triggered the following DCR approval rule(s). The DCR has been reassigned for further approval.

APPROVAL RULE	DESCRIPTION	TRIGGERED BY	DATE TRIGGERED	APPROVER	STATUS	DATE APPROVED
Suspect_Match_Hospital	This DCR will be routed to Supervisors	asha.singh@verteo.veevanetwork.com	2025-09-08 16:30:10 IST	SupervisorApprover	Pending Approval	

Close

This enhancement is available by default if the DCR Approval Rules feature is enabled in your Network instance.

To add the DCR Approval Rules feature to your Network instance, contact Veeva Support.

### About DCR approval rules

Administrators can define rules to restrict Data Stewards from merging specific records. For example, you can ensure that only supervisors and experienced Data Stewards can merge hospital or administrative HCO records because these changes can impact large HCO hierarchies.

When DCR approval rules are applied, Data Stewards can validate the information, but the DCR is automatically assigned to more experienced users for approval.

The DCR Approval Rules feature was released in Veeva Network 25R2.0 for add and change requests. For details, see [Multi-level DCR approval rules](#) in the *Veeva Network Online Help*.

### Supported objects for suspect match rules

- Veeva standard objects (HCPs, HCOs)
- Custom main objects

**Note:** Approval rules for suspect match tasks cannot be applied to sub-objects.



## *Process for defining DCR approval rules*

The process uses inbox task groups, user groups, and DCR Approval Rules.

1. **Inbox task group** - Create inbox task groups for experienced Data Stewards or supervisors. These are users that can approve the suspect match tasks that triggered the approval rules.

For rules that apply to multiple countries, an inbox task group must be created for each country's approvers.

2. **User group** - (*Optional*) Create a user group or use an existing user group for Data Stewards users that will be restricted from merging records.

You can also assign specific users to approval rules.

For detailed steps, see [Multi-level DCR approval rules](#) in the *Veeva Network Online Help*.

3. **DCR approval rule** - Define the conditions (object, country, fields) that will trigger the rule for suspect match tasks.

## *Create a rule for suspect match tasks*

The DCR approval rule determines the records that require approval from more experienced Data Stewards.

1. In the Admin console, click **Users & Permissions > DCR Approval Rules**.
2. In the object row, click **Add Rule**.
3. On the new rule page, define the following details:
  - **Rule Name** and **Description** - Type a meaningful name and description.
  - **Entity** - Specify the data model object for this rule.  
HCPs, HCOs, and custom main objects are supported.
  - **Countries** - List the countries affected by this rule.
  - **Status** - By default, the rule is not enabled.
4. **DCR Approval Rules** - Define the tasks and filters that will trigger the approval rule.
  - **Apply To** - Define the types of requests that the approval rules will apply to.  
Choose **Suspect Match Tasks**.
  - **Filters** (*optional*) - Define filters to narrow the conditions that will trigger the approval rule.  
**Important:** If filters are not defined, all suspect match tasks for the object will be routed for approval.
    - **Field** - Choose the field.  
All fields for the main object and related sub-objects display in the list.
    - **Condition** - Choose the appropriate condition.
    - **Value** - Select the values.

**Note:** If no filters are defined, the rule will apply to all records for the object.





### Example

Create a rule that prevents junior Data Stewards from merging HCOs that are hospitals because these changes can impact HCO hierarchies.

Suspect\_Match\_Hospital

DeleteCancelSave

▼ Details

Rule Name \*

Suspect\_Match\_Hospital

Description \*

Approvals for hospitals

Entity \*

HCO

Country \*

United States X

Status

☒ ENABLED

▼ DCR Approval Rules

Requests that meet these criteria will require further approval when processed by these users or groups.

APPLY TO \*

Define types of requests that the approval rules will apply to:

Apply To

☐ DCR Requests

☒ Suspect Match Tasks

FILTERS

Define optional filters. If no filters are defined, rule will apply to all records for the object.

Group 1

FIELD	CONDITION	VALUE	
Health Care Organization HCO Type (hco_type__v) ▼	In ▼	Organization, Hospital X	X

+ Add Filter

+ Add Group

The rule will be triggered if the filter is true for the winning or losing record.

5. **Rule Initiators** - Define the users that will trigger the approval process.

- **Only user groups and users specified below will trigger this rule** - Include the users that will trigger the rule.
- **All user groups and users except those specified below will trigger this rule** - Exclude the users that will not trigger the rule.

For example, you might use this option to ensure that all users except Supervisors are restricted from merging hospital records.

33



Add the applicable user groups and users.

**RULE INITIATORS \***

Select user groups and users which will trigger this approval rule.  
Triggering an approval rule means initiating the approval process whenever the conditions defined occur.

☒ Only user groups and users specified below will trigger this rule.  
☐ All user groups and users except those specified below will trigger this rule.

**User Groups**

Search selected user groups ...

<input type="checkbox"/>	GROUP NAME	DESCRIPTION	TYPE	ACTIVE USERS	STATUS
<input type="checkbox"/>	Data Stewards	All active users with the data steward user type.	System Managed Group	9	Active

Displaying 1 to 1 of 1 Show 25 1 of 1

---

**Users**

Search selected users ...

<input type="checkbox"/>	NAME	USERNAME	USER TYPE	STATUS	SECURITY POLICY	PROFILE	INBOX TASK GROUPS
No users selected. <a href="#">Add users to this rule.</a>							

---

**RULE APPROVERS \***

Define the approvers, who are able to process DCRs where rule applies. Tasks gets reassigned to these users or user groups as defined by the system administrator.

**Inbox Task Groups**

NAME	COUNTRY
SupervisorApprover	United States

- Rule Approvers** - Add the inbox task group for the users that can approve the suspect match task. The add or change request will be routed to the inbox task group.

**Important:** Users designated as both a **Rule Initiator** (with approval restrictions) and a **Rule Approver** will always be able to approve the suspect match task; the **Approvers** permission takes precedence. For rules applying to multiple countries, the suspect match task will be routed to the approver's inbox task group that matches the record's country. If no matching approver is found for a specific country, the DCR rules will not apply to that record.

- Save** the rule.
- When you are ready for the DCR approval process to begin, **Enable** the rule.

If a Data Steward tries to approve a suspect match task, the **DCR Approval Rules** dialog displays to advise that the task will be routed to Supervisors to process.



### DCR Approval Rules

DCR Approval Rules

Your changes has triggered the following DCR approval rule(s). The DCR has been reassigned for further approval.

APPROVAL RULE	DESCRIPTION	TRIGGERED BY	DATE TRIGGERED	APPROVER	STATUS	DATE APPROVED
Suspect_Match_Hospital	This DCR will be routed to Supervisors	asha.singh@verteo.veevanetwork.com	2025-09-08 16:30:10 IST	SupervisorApprover	Pending Approval	

Close

### DCR approval Rules page

Administrators can easily identify the approval rules for suspect match tasks using the **Apply To** column.

### DCR Approval Rules

1 items selected

Select Apply To

☒ Show Disabled Rules

[Reset filters](#)

**Health Care Professional** (7 enabled rules)  
OBJECT 

+ Add Rule

**Health Care Organization** (3 enabled rules)  
OBJECT 

+ Add Rule

Rule Name	Description	Countries	Apply To	Status
<a href="#"># of bed</a>	# of bed	United States	DCR Requests	Enabled
<a href="#">Suspect_Match_Hospital</a>	Approvals for hospitals	United States	Suspect Match Tasks	Enabled
<a href="#">HCONameAndStatusChange</a>	Rules for HCO Name and Status Change	United States	DCR Requests	Disabled



## Reports

### JOB IMPACT DASHBOARD

The Job Impact Dashboard feature was introduced in Network version 25R2.0.

The following enhancement is available in this release.

#### *Test queries*

Queries can now be tested on the tile configuration. Test the query to ensure it returns the desired results before adding the tile to the dashboard. Previously, queries could be tested in the SQL Query Editor only.

The screenshot shows the 'Job Impact Dashboard > Job Impact Dashboard Settings > Added HCPs' configuration page. The 'Added HCPs' section includes fields for 'Name' (Added HCPs) and 'Description' (HCPs added to this instance), and a 'Status' toggle set to 'Enabled'. The 'Query' section contains a text area with a SQL query and a 'Test Query' button highlighted with a red box. The SQL query is as follows:

```
1 SELECT
2   hcp.primary_country__v,
3   revision.job_id,
4   revision.source,
5   revision.subscription,
6   hcp_revision.vid__v AS HCP_Vid,
7   hcp.first_name__v,
8   hcp.last_name__v,
9   hcp.specialty_1__v,
10  hcp.hcp_type__v,
11  hcp.record_state__v,
```

This enhancement is enabled by default.



## Test a query

Queries can be tested only after a new tile or duplicated tile is saved.

1. On the Job Impact Dashboard (**Reports**), click **Manage Dashboard**.
2. Click **Add Tile** or duplicate an existing tile.
3. Provide any required information in the **Details** section.
4. In the **Query** section, add the SQL query for the tile. You can create a new query or customize any of the sample queries.
5. **Save** the tile.
6. Open the tile again.
7. In the **Query** section, click **Test Query**.

**Test Query**

**Job ID**  
Enter Job Id

**Subscriptions**  
Select Subscription

**Time Period**  
Select Time Period

**Start Date**  
2025-09-02

**End Date**  
YYYY-MM-DD

**SQL Query:**

```
SELECT
  hcp.primary_country__v,
  revision.job_id,
  revision.source,
  revision.subscription,
  hcp_revision.vid__v AS HCP_Vid,
  hcp.first_name__v,
  hcp.last_name__v,
  hcp.specialty_1__v,
  hcp.hcp_type__v,
  hcp.record_state__v,
  revision.created_at
FROM
  revision
JOIN
  hcp_revision ON revision.revision_id = hcp_revision.revision_id
JOIN
  hcp ON hcp_revision.vid__v = hcp.vid__v
WHERE
  hcp_revision.verb = 'Add'
  AND hcp.record_state__v IN (
    'VALID',
    'UNDER_REVIEW'
```

Click "Apply Filters" or adjust filters to see dashboard results.

8. In the **Test Query** dialog, provide sample filters.
9. Click **Apply Filters**.

The query runs and provides counts for a snapshot of one tile.

**Added HCPs**

HCPs added to this instance

**11**

10. If a count (greater than 0) displays, click the link to view the results in a Network table.
11. To edit the query, close the pop-up and return to the tile to make the changes and then test the query again.



## Data model

### COMMON DATA ARCHITECTURE (CDA)

The **Veeva ID** CDA field (`veevaid__v`) is now enabled by default in all Network instances. This field is the global identifier from Veeva data products and is used in the CDA data model.

This system field is enabled, even if the CDA data model is not enabled, so all customers and downstream systems have access to this Veeva-wide ID.

### Supported countries

The Veeva ID is enabled for OpenData countries where CDA is supported. CDA is not supported for China, Hong Kong, Japan, and Macao.

For more information, see [Common Data Architecture \(CDA\)](#) in the *Veeva Network Online Help*.

### Veeva ID and VID fields

The Veeva ID and VID fields are both ID fields used in Network, but they have differences.

### Comparison

ID	Definition	Supported records	Supported entities	Format
Veeva ID	The global identifier used across Veeva data products.	Veeva OpenData	HCP, HCO	21-character string HCP: V+01+VID HCO: V+02+VID
VID	Unique ID assigned by Veeva Network.	Locally managed Veeva OpenData Third party	HCP, HCO, Address, License, Parent HCO, custom objects	18-digits

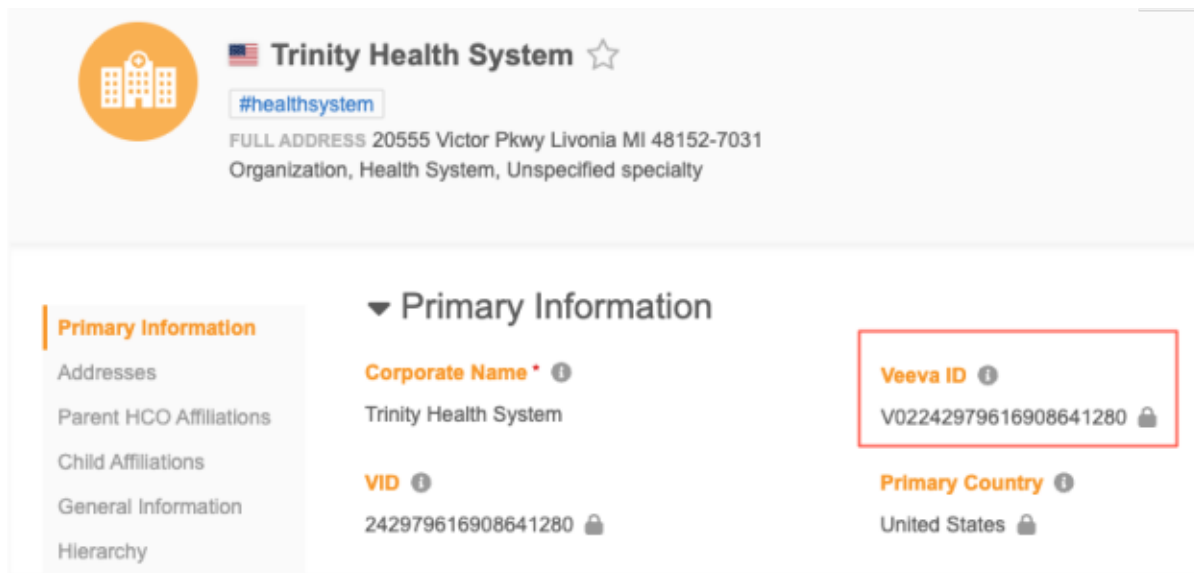
### Example ID field formats

Entity	VID	Veeva ID
HCP	243205709943014403	V01243205709943014403
HCO	242976940179325951	V02242976940179325951



### *View Veeva ID on record profiles*

The Veeva ID displays in the **Primary Information** section on standard profile layouts.



If you have created custom profile layouts for a country, add the field to the layout.

### *Veeva ID field updates*

The field is populated when the record is updated by Veeva OpenData (any field) and then is downloaded to your Network instance.

### **CLUSTER CODES FOR GERMANY**

Updated cluster codes from IQVIA™ are available for Germany.

### *New cluster version*

- Version 7.0.

The new cluster version is available by default if you have the Germany and 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 Germany / IQVIA cluster configuration.
3. In the **Cluster Management Details** section, expand **Cluster Version** and choose **Version 7**.
4. **Save** your changes.
5. Click **Refresh Addresses** to run a data maintenance job to ensure that all German addresses have the latest cluster codes.



## Match

### MATCH SUMMARY

The **Match Summary** section for job details now contain match statistics as percentages (%). The section previously contained only record counts.

New statistics are added for the processed data:

- % Not Matched
- % ACT Matches
- % ASK Matches

Job Details (ID: 40613)

View Job Impact Dashboard

▼ Overview

Subscription HCPDeduplication

Action Data Deduplication

Started By John Smith

	JOB ID	START TIME	END TIME	CURRENT STAGE	PERCENT COMPLETE	OUTCOME	DURATION	
Match Job	40613	2023-12-04 18:14:13 GMT	2023-12-05 15:24:55 GMT	FinalStage	100.00%	COMPLETE	21 hours	Cancel
Merge Job	40614	2023-12-05 15:24:55 GMT	2023-12-05 15:25:04 GMT	FinalStage	100.00%	COMPLETE	a minute	Cancel

▼ Data Load Summary

ENTITY	ROWS READ	ROWS PARSED
HCP	20	20

▼ Match Summary

ENTITY	NOT MATCHED	% NOT MATCHED ⓘ	ACT MATCHES	% ACT MATCHES ⓘ	ASK MATCHES	% ASK MATCHES ⓘ
Health Care Organization	0	0%	0	0%	0	0%
Health Care Professional	5	25%	10	50%	5	25%

**Note:** The percentages may not equal 100 due to rounding.

This enhancement is enabled by default.

### Supported features

The new statistics are available in the **Match Summary** section in the Job Details for the following features:

- Subscriptions that contain the Match Summary
- Data Deduplication jobs

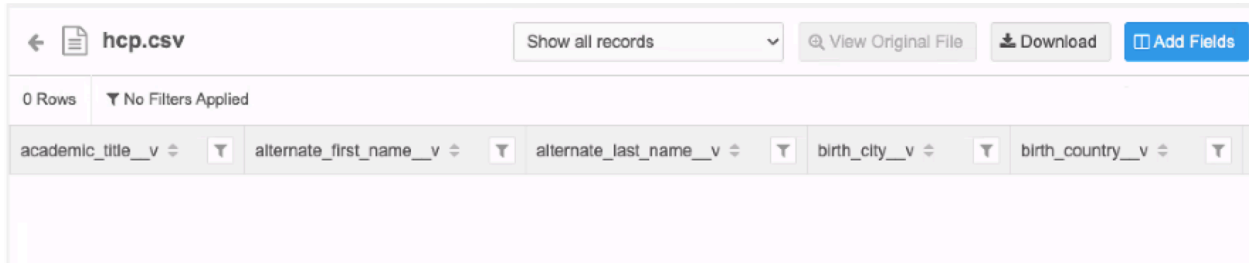




## Target subscriptions

### INCLUDE HEADER ROW IN EMPTY EXPORT FILES

Files that are exported from Network without data can now contain headers so downstream systems can consistently process the file format.

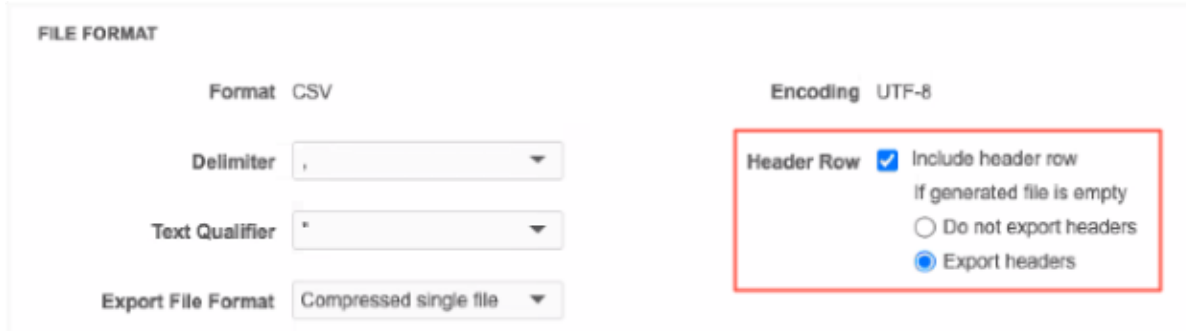


This enhancement is available by default in your Network instance. Administrators and Data Managers can enable the setting in target subscription configurations.

### *Include header rows on empty files*

Target subscription configurations contain a new setting to include header rows on empty files.

The settings display if the **Include header row** option is selected in the **File Format** section.



Choose the behavior for including a header row if the generated file is empty:

- **Do not export headers** (default)
- **Export headers**

### *Existing configurations*

There is no impact to existing configurations.

If **Include header row** setting is enabled in an existing subscription, the **Do not export headers** option is set by default.

Administrators can change the option to **Export headers**.



## Vault CRM integration

The following enhancement is available for customers who integrate Network with Vault CRM.

### VAULT CRM BRIDGE RECORD COUNTS

Network Administrators can now see the number of unchanged records that were upserted to Vault CRM in a bridge job. The counts for records added and updated have also been enhanced so they more accurately reflect the data.

▼ Bridge Summary				
OBJECT TYPE	ADDS	UPDATES	ERRORS	UNCHANGED
CONTROLLED_ADDRESS	0	0	0	0
HCP	0	0	4	170
PARENTHCO	1	0	3	750
HCO	1	0	0	505
ADDRESS	0	2	37	640
LICENSE_OH_CLEANUP	0	0	0	0
HCP_ACCOUNT_IDENTIFIER	0	1	0	0
HCO_ACCOUNT_IDENTIFIER	0	16	0	0
LICENSE_DEA_CLEANUP	0	0	0	0

This enhancement is enabled by default.

### Job details

After a Vault CRM Bridge job runs, the **Bridge Summary** on the Job Details page displays a count of records that were added, updated, and had errors.

The **Unchanged** column is added to the table.

- **Adds** - Upserted records were created in Vault CRM.
- **Updates** - Upserted records were updated in Vault CRM.
- **Errors** - Records failed to be upserted to Vault CRM.

Click **Download Error Report Log** for details.

- **Unchanged** - Records were upserted to Vault CRM but did not contain changes.



### *Report on upserted records*

Advanced reporting users can report on the data from the **Bridge Summary**. In the SQL Query Editor (**Reports**), the **Job Stats** table is updated to include unchanged records.

#### **Example query**

Use this query to understand the impact of a bridge job.

```
SELECT
    job.job_id,
    job.subscription,
    job.job_system,
    job.status,
    job.start_time,
    job_stats_view. "hco.adds",
    job_stats_view. "hco.updates",
    job_stats_view. "hco.unchanged",
    job_stats_view. "hcp.adds",
    job_stats_view. "hcp.updates",
    job_stats_view. "hcp.unchanged"
FROM
    job LEFT OUTER JOIN (
        SELECT
            mainTbl.job_id,
            tbl1.counter AS "hco.adds",
            tbl2.counter AS "hco.updates",
            tbl3.counter AS "hco.unchanged",
            tbl4.counter AS "hcp.adds",
            tbl5.counter AS "hcp.updates",
            tbl6.counter AS "hcp.unchanged"
        FROM
            (
                SELECT
                    DISTINCT job_id,
                    job_id AS redshift_distinct_helper_col_tmp
                FROM
                    job_stats
            ) AS mainTbl LEFT JOIN (
                SELECT
                    job_id,
                    counter
                FROM
                    job_stats
                WHERE
                    metric = 'hco.adds'
            ) AS tbl1
            ON mainTbl.job_id = tbl1.job_id LEFT JOIN (
                SELECT
                    job_id,
                    counter
                FROM
                    job_stats
                WHERE
                    metric = 'hco.updates'
```



```

        ) AS tbl2
        ON mainTbl.job_id = tbl2.job_id LEFT JOIN (
        SELECT
            job_id,
            counter
        FROM
            job_stats
        WHERE
            metric = 'hco.unchanged'
    ) AS tbl3
    ON mainTbl.job_id = tbl3.job_id LEFT JOIN (
    SELECT
        job_id,
        counter
    FROM
        job_stats
    WHERE
        metric = 'hcp.adds'
    ) AS tbl4
    ON mainTbl.job_id = tbl4.job_id LEFT JOIN (
    SELECT
        job_id,
        counter
    FROM
        job_stats
    WHERE
        metric = 'hcp.updates'
    ) AS tbl5
    ON mainTbl.job_id = tbl5.job_id LEFT JOIN (
    SELECT
        job_id,
        counter
    FROM
        job_stats
    WHERE
        metric = 'hcp.unchanged'
    ) AS tbl6
    ON mainTbl.job_id = tbl6.job_id
) AS job_stats_view
    ON job.job_id = job_stats_view.job_id
WHERE
    job.job_type = 'bridge'
    AND job.start_time > dateadd (
        'day',
        - 5,
        CURRENT_DATE
    )
)

```



## Example results

Sample Queries

My Recent Queries

Query Helper: 

Keywords

Operators

Format Query

```
1 SELECT
2     job.job_id,
3     job.subscription,
4     job.job_system,
5     job.status,
6     job.start_time,
7     job_stats_view."hco.adds",
8     job_stats_view."hco.updates",
9     job_stats_view."hco.unchanged",
10    job_stats_view."hcp.adds",
11    job_stats_view."hcp.updates",
12    job_stats_view."hcp.unchanged"
13 FROM
14     job LEFT OUTER JOIN (
15         SELECT
16             mainTbl.job_id,
17             tbl1.counter AS "hco.adds",
18             tbl2.counter AS "hco.updates",
19             tbl3.counter AS "hco.unchanged",
20             tbl4.counter AS "hcp.adds",
21             tbl5.counter AS "hcp.updates",
22             tbl6.counter AS "hcp.unchanged"
23         FROM
24             (
```

Query Valid

☒ Include only VALID and UNDER\_REVIEW records in results. ⓘ

Report Results (2 records)

Download Report

Create Custom Table

View Full Screen

Table

Chart

JOB ID	SUBSCRIPTION	SYSTEM	OUTCOME	START TIME	HCO.ADDS	HCO.UPDATES	HCO.UNCHANGED	HCP.ADDS	HCP.UPDATES	HCP.UNCHANGED
2880	vaultcrm_US	vaultcrm	COMPLETE	2025-09-08 11:51:44	1	0	505	0	0	170
2869	vaultcrm_US	vaultcrm	COMPLETE	2025-09-04 14:39:29	23	0	482	2	1	167

Displaying 1 to 2 of 2

Show 25 1 of 1 < >



## Logs

### IDENTIFY SEARCHES FROM CHINA CRM

Administrators can now quickly identify searches originating from China CRM from the Search Audit History.

**Search Audit History**

Date range: 2025-08-25 To 2025-08-26 Search Origin: ChinaCRM Online X, ChinaCRM WeChat X [Get History] [Reset]

Choose time period... ▾

TIMESTAMP	NETWORK USER NAME	SEARCH USER NAME	STATUS	FOUND	RETURNED	QUERY	ADDRESS QUERY	DATA TYPES	ORIGIN
2025-08-26 15:04:32 EDT	api.only.3.1@network.com	api.only.3.1@network.com	SUCCESS	400	10	*		HCO,HCP	ChinaCRM WeChat
2025-08-26 15:03:52 EDT	api.only.3.1@network.com	api.only.3.1@network.com	SUCCESS	400	10	*		HCO,HCP	ChinaCRM Online

Displaying 1 to 2 of 2

This enhancement is enabled by default in your Network instance.

### Search origin

The following **Search Origin** categories have been added to the log:

- ChinaCRM Online
- ChinaCRM WeChat

### View China CRM searches in the log

To filter the log for China CRM searches:

1. Open the Search Audit History (**Logs**).
2. Define the **Date range**.
3. Click the **Search Origin** field and choose one or both of the following:
  - ChinaCRM Online
  - ChinaCRM WeChat
4. Click **Get History** to view the results.