Veeva Network 3.0.0.1 Release Notes

July 2014

Contents

About these Release Notes

The Veeva Network 3.0.0.1 Release Notes describe all features introduced since Veeva Network 2.0.

Browser requirements

The following are the minimum browser requirements for Veeva Network 3.0.0.1:

- Internet Explorer 10
- Google Chrome 20+
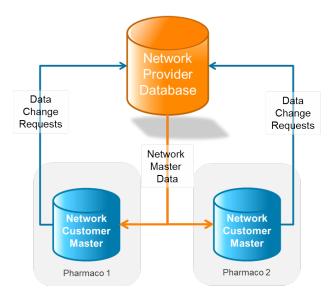
Future enhancement

Support for Internet Explorer 9 will be added in a future release.

Introduction

Veeva Network includes Network Customer Master, and for applicable countries, Network Provider Database (NPD).

Network Provider Database provides identity, demographic, and licensure data about Healthcare Professionals and Healthcare Organizations.

Network Customer Master is a SaaS Master Data Management (MDM) application that is populated with a subset of the data from Network Provider Database, according to each pharmaco's contract with Veeva.

Network Customer Master

Veeva Network Customer Master is a multi-tenant SaaS Master Data Management (MDM) application. Each pharmaco that subscribes to Veeva Network has its own Network Customer Master tenant (often referred to as a *Network org* similar in concept to a Veeva CRM or Salesforce.com org).

Each Network org comes pre-populated with master data from the Network Provider Databases to which the pharmaco has subscribed. Veeva Network automatically keeps the data in each production Network org up-to-date and in sync with the data in the Network Provider Database.

Pharmacos can also load their own data into their Network org and match and merge it with the Veeva-provided master data. Veeva is responsible for stewarding the quality of the Veeva-provided data as well as any new records added in the Network org that can be shared with Veeva Network Provider Database.

Records that do not match Veeva records will be loaded as customer-stewarded records and updates on those records will not be shared with Veeva Network Provider Database.

Summary

Veeva Network 3.0.0.1 includes the following key enhancements:

- **Data governance –** Updates to field and reference data, documented in the *Veeva Network Data Governance* release notes.
- **Global Customer Master –** Data model and reference data are country-aware. New functionality includes country-specific data management, access, and visibility, as well as ad hoc match options to filter by country and ability to select fields to export based on the selected countries.
- **Search enhancements –** Includes search against NPD from iRep, multi-country support to ensure effective language-specific search results.
- **Reports –** Data stewards can run predefined reports to view statistics for new and updated records.
- **Unmerge –** Selectively separate records from a merged record.
- **Source subscriptions –** Simplified configuration page for defining source data loads.
- **Selective export for inactive data –** Full target exports can include inactive (merged and deleted) records.
- **Data de-duplication –** Reduce duplications in source even when source doesn't match against NPD data.
- **System overview/statistics –** Data change statistics have moved to the Administration console. Specify time periods to view data for and specify method of display, by days, weeks, or months.
- **Restricted sources –** Information on data lineage is hidden for restricted view data sources.
- **Ad hoc match –** Automatically export the top two addresses for matched records.

- **Customer-managed child objects –** Add addresses, affiliations, and licenses to Veeva-managed records.
- **Source inactivation detection –** Detect records that have been removed from a source feed and flag the record in Network as a deleted record.
- **Match against NPD –** Match records against the Network Provider Database during test loads.
- **Export from search –** Enable export of records from your Network org to a file, directly from the search results page. Enable Export from Search functionality from the Admin console.
- **Search filters –** Facet to filter search results by ownership (customer-owned or Veeva-owned records).
- **Starring from search –** Add or remove a star for multiple entries at once on the search results page.
- **General enhancements –** Inbox refresh pausing, Inbox Select All functionality, Job Details enhancements, consistent date and time formats throughout Network, repositioned buttons in Ad Hoc Match for usability, and alternate key display for affiliations in profiles.

Updates in this release

The following sections describe the updates for Veeva Network 3.0.0.1, and include all features introduced since Veeva Network 2.0.

DATA GOVERNANCE

Specific updates for fields and reference data are provided in the *Veeva Network Data Governance* release notes.

GLOBAL CUSTOMER MASTER

Veeva Network 3.0.0.1 provides a multi-country single instance with country-aware data model and reference data, localizable page layouts and visibility profiles, and task routing using country-specific task groups.

Every record in your data is designated with a primary country. Individual fields can be linked to one or more countries with language-specific labels. Reference data includes multiple languages for each code description, and is effectively filtered according to the primary country; values pertaining to that country only will appear in the list for each reference type.

Each Network user can have one or more data visibility profiles to determine their data permissions and page layout. Each data visibility profile is linked to a country to which they have access.

Inbox task groups, which can be used to limit access privileges for a particular country, determine which tasks a data steward can manage. Data stewards can belong to multiple task groups to manage multiple sets of country-specific data.

LOCALIZATION

Veeva Network 3.0.0.1 includes translations for most of the UI for Chinese, French, Italian, German, and Spanish. The language that appears for each user is dependent on their user settings, which are configured by an administrator.

This is the first release of Network to include localization, and we expect that the translations will contain omissions and inaccuracies. Areas of the UI that have not yet been localized will appear in English, regardless of your user settings.

You can send feedback on errors or omissions in the translations to NetworkLocalization@veeva.com.

WORKFLOW

Customer-managed child objects (addresses, affiliations, and licenses) can now be added to Veeva-managed records through data feeds or change requests. Workflow settings (create unverified, review rejections) that are enabled extend to these child objects.

You can now specify that addresses are required for each HCP or HCO entity, which will improve fuzzy matches for incoming add requests. For Chinese data, you can specify this requirement for HCOs only. Veeva must enable this functionality for your Network org. To enable this functionality, log a case with Veeva Network Support.

Address cleansing is now built into the workflow and user interface and cleansed addresses can be verified by data stewards at multiple stages of the change or add request process. When an add or change request task is reviewed, the verified address can be accepted in whole (with the rest of the request), reverted to the original address, or overridden by the data steward. The data steward can then choose to have the address validated again, using a **Verify** button from the request.

Multi-country support functionality ensures that address cleansing is country specific.

Future enhancements

Child objects that have been automatically approved are currently editable (but should not be editable) in the data change request review page. This will be fixed in a future release.

LOADING CUSTOM SOURCES INTO A NETWORK ORG

Source subscription configuration is now simplified to enable you to easily update source file parameters, job properties, and rule definitions.

In source subscriptions, the Module Properties field has been replaced with individual property fields for the most common properties. The full Module Properties field is still available using Advanced Mode.

You can configure Network to detect records that have either been removed or deactivated in source feeds, and flag the record as inactive in your Network org. In the source subscription, you can change source inactivation detection behavior using the feed.inactiveMissingItems flag.

Rule expressions defined in source subscriptions now support post-merge rules. These rules include additional functions and are applied to data after it has been matched and merged, only on entities for which data has changed. For more information on defining post-merge rule expressions, see Add a source subscription in the user documentation.

The DATE and DATETIME functions for rule expressions in source subscriptions formerly returned values in epoch format. They now return values in GMT format.

Currently, when an external system uses an empty string ("") to clear the value of a field, the string is ignored. To clear the value of a field, you should use the string defined (for example, "null") for NULL values in the source subscription.

Properties for the parser stage of a source subscription have been added. This has no impact on existing subscriptions. For more information on configuring job properties, see Add a source subscription in the user documentation.

Reference data can now be created automatically on data load for custom reference types, where Network codes or aliases do not already exist for a field. You can enable this feature in the Create New Reference Type dialog.

Network supports loading of externally managed contract organizations, which can be excluded from fuzzy match and merge. Updates to externally managed data are overridden by subsequent updates from the contract organization. Records for these sources are excluded from search results for standard and read-only users. You can exclude externally managed records from export in the target subscription.

In source subscriptions, you can enable source merge to preserve merge and survivorship determination by an external system on its data. Network does not apply survivorship rules in this case; it provides the final view of the surviving record.

STANDARD FIELDS AND CUSTOM FIELDS

Standard and custom fields can now be enabled and disabled for specific countries.

Administrators can add labels in different languages to custom fields

You can now edit reference types.

Custom reference codes no longer include a __c suffix. This does not apply to previously created custom reference codes or Veeva reference types.

The data model diagram has been removed from the Network Data Model page.

You can now sort information under each entity by ownership (Veeva or customer), field name, description, or type.

EXPORTING DATA

You can filter target subscriptions by country. You can select individual fields for export or allow Network to determine the set of fields to export for the selected countries. By default, fields are exported based on the country that is selected. If no countries are specified, all fields are exported.

For full exports, target subscriptions now allow you to export either only active records, or all records (active or inactive).

In a target subscription, you can now select all entities and fields for full or partial export, or for exclusion from the export. You can also choose to export updates only for child entities.

In a target subscription, the **Apply as filter** option enables you to use the selected system as filter criteria for the data export. You can use this option with field filters to export data that matches any of the filters you selected.

DATA MIGRATION

You can now export Veeva-owned record IDs and custom key values in order to quickly migrate data to another Network org. Exported record IDs will not include child record IDs (for address, license, or relationship entities) and will be saved to the Network FTP server. You can do this in the Administration console under **System Interfaces > Data Migration**.

Exported custom key values include the Veeva ID of the Veeva-owned record (HCP or HCO), the custom key itself, and the record type (HCP or HCO). Administrators can access this functionality using **Admin > System Interfaces > Data Migration**.

MATCHING, MERGING AND SURVIVORSHIP

Matching now includes country-specific rules that are run according to the primary country for a particular data feed.

The Suspect Match page has been improved when loading data that has duplicates. In situations where duplicate records are loaded that do not have a corresponding match in the Network org, you can view the matches within the source file and select which records survive.

Where active and inactive addresses exist for a record, active addresses will now always have an ordinal rank higher than inactive addresses.

You can match incoming records against the Network Provider Database and Customer org during test loads (without saving the data). In the source subscription, you activate match against NPD using the job.match.networkMasterLinkage flag (which is false by default). When this flag is set to true, the subscription is run in test mode (data is not loaded) and results are saved to the match log file in your ftp server. Match behavior is as follows:

- For ACT matches found in the Network org, Network does not look for matches in the NPD.
- For ASK or no match found in the Network org, Network matches the incoming record against the NPD using applicable match rules from the subscription. Match rules containing custom fields will not be applied when matching against the NPD.

Ad hoc match

The orientation of the field mappings has changed to allow for more natural scrolling.

In ad hoc match, you can now select any master or custom field from the field mapping drop down list. Previously a subset of fields appeared in this list.

For ad hoc matches, the two addresses exported in the ad hoc match CSV output are now the top two (ranked with ordinal 1 and 2).

On the Match New File page in Ad hoc match, the Save Fields and Load Fields buttons have been repositioned for easier access.

SEARCH

Search results are automatically filtered according to the data visibility profile rules.

You can now filter search results by record owner to display either customer-owned or Veeva-owned records.

When you select a record (or all records) in search results, options now appear to enable you to perform the following tasks:

- add or remove a star for multiple records at once.
- export records from your Network org to a .csv file. This option must be enabled in the General Settings page of the Admin console. By default, you can export a maximum of 500 records. (Veeva can change this default for your Network org.) Before you export a record that is not in your Network org, you must download the record using the cloud download icon in the search results. Your user account must have been given permission to download records from the Network Provider Database.

Search results for Chinese Network instances have been improved through better matching analyses for double byte language sets.

Search results now include alternate keys, where defined, for each entity.

Improvements have been implemented to allow you to enable search against NPD for large data sets.

REPORTS

You can now access predefined reports from the main console to view statistics for HCO changes and additions, as well as for data change requests.

Future enhancement

Future releases will include the ability to define reports.

STARRED ITEMS

You can now select records to export from your Network instance directly from the Starred items page.

You can add or remove stars directly from the Inbox, by selecting one or more items to add or remove.

PROFILE

The Data Lineage page does not display data lineage comparisons for restricted data sources. This protects data agreements with third-party vendors.

The Data Lineage page includes an option to selectively remove (unmerge) records from a merged record. You can unmerge multiple records and create a new record (from the unmerged records) or create each record as a customer merge.

Future enhancement:

Include an option to link records for the same individual in different regions for aggregate spend reporting. This option will not merge these records, due to data privacy restrictions.

For data stewards, profiles no longer display custom keys for license, parent HCO, or address entities.

Master data stewards can now initiate a suspect match from a profile using the Veeva ID of the suspected match.

When you add a new parent affiliation to a profile, search results appear for the corporate name as you type.

When you add a new parent affiliation in a profile, search results within the **New Parent Affiliation > Corporate Name** field include alternate key values.

Reference code values now display in alphabetical order for easier selection.

When selecting dates for various field values in Network, you can now properly select past years. The date picker also includes general usability enhancements.

Previously, if you submitted a change request setting a value to NULL, the field did not appear in the Source Comparison view. Changes to NULL values now appear in the Source Comparison view.

INBOX

You can now pause auto-refresh of the Inbox. While refresh is paused, you can refresh the page manually.

Inbox task groups determine which tasks a data steward can manage. Data stewards can belong to multiple task groups to manage multiple sets of data.

When you select tasks in the Inbox using the Select All check box, you can now specify whether all tasks in the entire Inbox are selected, or only all tasks that appear on the current page.

The Job Details page has been enhanced for usability, prioritizing and presenting key information more succinctly.

Tasks in the Inbox now display the assignee of the task, or "not assigned" if the task has not yet been assigned. The assignee replaces the status, which was formerly displayed for each task in the Inbox.

You can now change the number of tasks that appear in the inbox using a dropdown list. You can choose to display 10, 25, 50, or 100 tasks in the Inbox list. The default is 50.

The Inbox now includes a facet that enables you to filter by source system. If no source systems are defined, the facet appears as "Local."

By default users will now see New and In Progress tasks that are assigned directly to them or to one of the groups they belong to.

Users with permissions for multiple countries can select a country before adding a new HCP or HCO.

You can now reassign multiple tasks directly from the Inbox by selecting the tasks and clicking **Re-assign**. Note that you and the assignee must have full rights to the tasks assigned; any tasks you or the assignee do not have rights to will be omitted from the bulk assignment.

SYSTEM OVERVIEW

The System Overview is now only available to administrators, and is accessible through **Admin > System Summary**.

The System Overview page now allows you to specify a time period for which to view data, as well as selectors for how you want to see the data (by days, weeks, or months) where applicable.

NETWORK EXPLORER

You can now define filters from the Network Explorer tree view, to filter by specialty and hierarchy type.

Future enhancement

In some circumstances, parent entities incorrectly appear overlapped in the main Network Explorer view. This will be fixed in a future release.

ADMINISTRATION

In user profiles, you can now select the language to display for each user. This affects all UI elements and data.

Each Network user can have one or more data visibility profiles to determine their data permissions and page layout. Each data visibility profile is linked to a country to which they have access.

In the General Settings page, you can now enable the Export From Search functionality, which allows you to export records from your Network org to a .csv file.

You can now customize the pop-up login message text, or provide a checkbox to disable it, from **Admin > General Settings**. This allows you to provide your own legal notifications for end users, or any other messages that you want your end users to see when they log in to Network. Veeva must enable this functionality for your Network org.

GENERAL

Date and time formats are now displayed consistently throughout Network.

APIs

For users that are enabled for search against NPD (through the Admin console), Network provides search results from both the Network org and NPD. In cases where a record is found in both instances, the record from the Network org is returned in the search results.