



# veeva Network

Veeva Network 9.0.0.1 Release Notes

**August 2016**



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## About these Release Notes

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These Release Notes describe all features included in Veeva Network 9.0.0.1.

## Browser requirements

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The following are the minimum browser requirements:

- Internet Explorer 11+
- Google Chrome (most recent stable version at Network release)
- Safari 6+

## Summary

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The following key enhancements have been introduced since Veeva Network 8.5.2:

### DATA LOAD

- **Match against Veeva OpenData** – Downloading match records from master data is now available through source subscriptions.

### MATCH

- **Data Groups (Blockers) Analysis log** – The Data Group Analysis log file is renamed.
- **Match Analysis log** – Changes have been made to the exported match file from within a source subscription.

### LOGGING

- **FTP activity logs** – Auditing FTP activities for a Network instance is now available.
- **Task Audit contains system name** – Third party master information is included in the log message and change request details.

### REPORTING

- **Unmerged HCP and HCOs report templates** – New templates added to compare the HCO and HCP entities that were unmerged from each other.

### VEEVA NETWORK CONNECTOR FOR CONCUR

- **Concur Connector** – Connect to Concur directly from the Admin console.
- **Search Veeva OpenData for HCPs** – Users can search Veeva OpenData records for HCPs to add to expense reports.

### DATA VISIBILITY PROFILE

- **Mandatory fields** – Some fields must be included for third party master systems.
- **Page layout renamed** – The `USStandard` page layout is now called `NASstandard`.



## DATA GOVERNANCE

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

The following key enhancements were introduced in Veeva Network 8.5.1 and 8.5.2:

## DATA LOAD

- **Source subscription settings** – Settings now also include options to output data group analyses and to perform source deduplication analysis.
- **Network expression rules** – The COUNT function enables you to perform actions on a record based on counts (for example, of valid addresses) within a record.

## MATCH RULES

- **Conditional matching** – Use conditional matching, exclude and limit, in HCP and HCP match rules.
- **Advanced mode** – Network warnings prevent you from leaving Advanced mode where match rules contain functionality that is only supported in Advanced mode.

## CANDIDATE RECORDS

- **Candidate record resolution** – Resolve candidate records by promoting or deleting them from a single dialog.

## PRIMARY AFFILIATIONS AND ADDRESSES

- **Multiple affiliations or addresses** – Multiple primary affiliations or addresses in a source feed are resolved automatically.

## DCR IMPORT AND EXPORT

- **DCR management with third party systems** – Import and export data change requests for use with third party master systems.

## REPORTING

- **Report templates** – Create new reports or ad hoc queries using predefined report templates.
- **Exported results** – escape character is now double quotation marks (“”).
- **Results links** – Network entity ID links in report results now reflect visited link style.
- **Performance improvements** – Load times of reporting data has been improved across various reporting pages.

## DATA QUALITY REPORTS

- **Wizard** – Rerun the Data Quality Reports wizard at any time, not just at startup.
- **Dashboard** – Test cases include percentage fail rates, and owner filter appears only if you subscribe to Veeva OpenData.
- **Recent items** – Test cases now appear in the Recent items list.
- **Progress indicator** – A progress bar indicates load time for detailed test case results.
- **Localization** – Test cases and entity groups are localized and can be further customized by language.



### AD HOC QUERIES

- **Next database update** – Ad hoc query page includes information on when the next reporting database update will occur.
- **Filters** – Filter string and ID values using multiple values.
- **Format advanced queries** – Use the editor to format queries.
- **Advanced query template** – Load queries from report templates and easily indent advanced query code.

### ADDRESS INHERITANCE

- **Enable and configure** – set up your Network instance to use the address inheritance feature.
- **Inherit parent HCP address details** – Copy selected parent HCO address information to child objects during data updates automatically.
- **Null and all value selection** – Enable inclusion of records containing null values, and easily select all values for inclusion.

### WORKFLOW

- **Enable child object comparison** – Copy selected parent HCO address information to child objects during data updates automatically.

### REFERENCE DATA

- **Persistent filters** – Filters set for the Reference Data page persist when you leave and return to the main page.
- **Inactive reference data** – Inactivate reference codes you don't need

### JOB DETAILS

- **New details** – Information has been added for source and target subscription jobs.

### SECURE FTP

- **SFTP support** – Network now supports the Secure File Transfer Protocol.

### PERFORMANCE

- **Search** – Improvements for HCO and HCP searching.

### GENERAL ENHANCEMENTS

- **Menu** – on larger screens, the **Help** and **Recent** menu items provide text beside the icon.

### API

- **Retrieve change request (including batch)** – Now includes parameters to retrieve requests modified prior to and since specified dates.
- **Change request match** – The new Change request match API enables you to match a change request against an existing entity.
- **Retrieve entity and retrieve child entity (including batch)** – Retrieve information on any entity or child entity without indicating the specific entity type.
- **Error codes** – Distinct error codes advise about retrying the API call when the dataflow server is not responding.





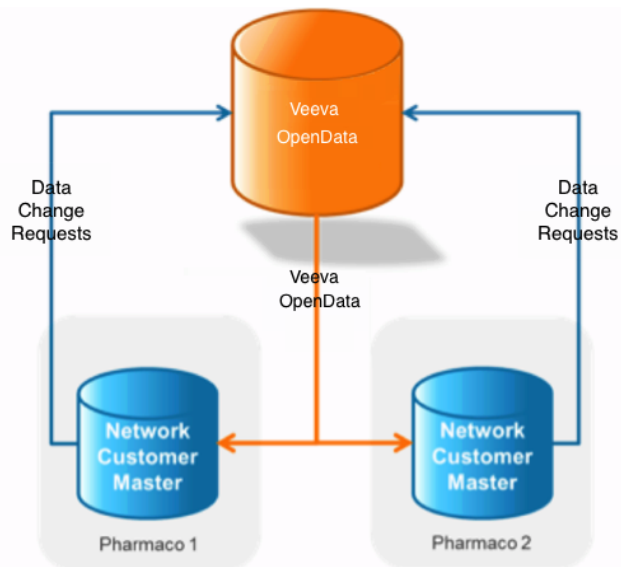
## Introduction

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Veeva Network includes Network Customer Master, and for applicable countries, Veeva OpenData Customer Data.

*Veeva OpenData* 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 Veeva OpenData, according to each pharmaco's contract with Veeva.



## Network Customer Master

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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).

Where Veeva OpenData is enabled, each Network org comes pre-populated with data from the Veeva OpenData 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 Veeva OpenData.

Pharmacos can also load their own data into their Network org and match and merge it with the Veeva OpenData 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 OpenData.

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 OpenData.



## Data load

The following sections describe changes for data load.

### SOURCE SUBSCRIPTION SETTINGS

With the addition of two new settings, administrators and data managers now have the following options from the main source subscription UI page:

- Job Error Log
- Source Dedupe (new)
- Export Data Group Analysis (new)
- Export Match Analysis
- DCR Response File Provided

Update these settings in the Admin console:

1. From the Admin console, select **System Interfaces > Source Subscription**.
2. Select an existing source subscription or create a new one.
3. In the **Settings** section, you can specify the following:
  - **Job Error Log:** Export the error log for the source subscription to your FTP server. You should deselect this after testing concludes, as the error log takes time to produce.
  - **Source Dedupe:** Choose whether to deduplicate data loaded in this source subscription.
  - **Export Data Group Analysis:** Export data group (or blocker) details to your FTP server.
  - **DCR Response File Provided:** For third party master systems, DCR response files will be processed. The DCR filenames must start with “DCR\_”.

▼ Settings

Allow File Reprocessing ?

Job Error Log ?

Source Dedupe ?

Apply Updates & Merge ?

DCR Response File Provided ?

Export Data Group Analysis ?

Action for Unmatched & Suspect Match: Create Valid Records ?

Export Match Analysis: [Dropdown] ?

### MATCH AGAINST VEEVA OPENDATA

Automatically downloading records to your Network instance that match (ACT) with Veeva OpenData is now available from a source subscription. This replaces manually downloading records from a match log file. Records that do not already exist in your Network instance are downloaded. To avoid duplicates, if an existing customer-owned record exists, the Veeva OpenData record is not downloaded; however, customer-owned records might be updated. Weak or suspect matches are not downloaded.

**Note:** The HCO parent record is not automatically downloaded to your Network instance if it is not in the Veeva OpenData source file.



To automatically match against Veeva OpenData and update your Network instance, the following two settings must be selected when you create a new source subscription:

- **Match Against OpenData** – ACT matches your data against Veeva OpenData
- **Apply Updates & Merge** – downloads the matched records to your Network instance

### MAM\_test Details

Advanced Mode Clone Cancel Save

---

**▼ Details**

Name:  System:

Description:

---

**▼ Settings**

Allow File Reprocessing ?
  Apply Updates & Merge ?

Job Error Log ?
  Match Against OpenData ?

Source Dedupe ?
  Export Data Group Analysis ?

Action for Unmatched & Suspect Match:  ?
 Export Match Analysis:  ?

Automatically matching against Veeva OpenData is not supported for third party master systems. An error occurs if a third party data source tries to run matches against Veeva OpenData.

The Veeva OpenData subscription must be enabled for the country for this feature to work. Contact Veeva Support to have this option enabled for your Network instance.

### NETWORK EXPRESSION RULES

Network expressions now support the COUNT function, which enables you to exclude records from a feed that don't satisfy the COUNT value. For example, you could exclude candidate records with no active or valid addresses from a feed using the following rule expression:

**▼ Network Expression Rules ?**

RULE POINT	FILE / ENTITY	RULE
<input type="text" value="After Update"/>	<input type="text" value="HCO"/>	<pre>[   "candidate_record__v = IF(COUNT(addresses__v AS address WHERE   address.address_status__v == 'A' &amp;&amp; address.record_state__v == 'VALID')   == 0, true, false)" ]</pre>



## Match rules

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### CONDITIONAL MATCHING

The existing limit and exclude match configuration options that can currently be used for child objects (licenses, addresses or parent HCOs) have been extended so they can also be used in HCO or HCP match rules.

The following examples illustrate how to use conditional matching. The first example matches corporate names but only for records where values in the HCO type field equal 4:1 or 4:15.

```
<feature>
  <name>Corporate Names are the same for selected HCO types</name>
  <enabled>true</enabled>
  <comments></comments>
  <collate>
    <direct>
      <field>corporate_name__v</field>
      <filter>
        <field>hco_type__v</field>
        <value>4:1</value>
        <value>4:15</value>
        <type>INCLUDE</type>
      </filter>
      <nullMatching>IGNORE</nullMatching>
      <nGramComparison>
        <gramLength>2</gramLength>
        <threshold>0.7</threshold>
      </nGramComparison>
    </direct>
  </collate>
</feature>
```

The second example matches on the corporate name but only for records where the values in the HCO type field are not equal to 4:1 or 4:15.

```
<feature>
  <name>Corporate Names are the same for HCO types not equal
    to 4:1 or 4:15</name>
  <enabled>true</enabled>
  <comments></comments>
  <collate>
    <direct>
      <field>corporate_name__v</field>
      <filter>
        <field>hco_type__v</field>
        <value>4:1</value>
        <value>4:15</value>
        <type>EXCLUDE</type>
      </filter>
      <nullMatching>IGNORE</nullMatching>
      <nGramComparison>
        <gramLength>2</gramLength>
        <threshold>0.7</threshold>
      </nGramComparison>
    </direct>
  </collate>
</feature>
```



```

    </collate>
  </feature>

```

INCLUDE and EXCLUDE must be in all upper case:

- INCLUDE – only entities with listed value or string are used in the match rule
- EXCLUDE – every entity except the ones with the listed property are used in the match rule

#### ADVANCED MODE

Within the match rules for an HCP or HCO, filtering capabilities can only be applied in Advanced mode in the match UI. If you attempt to return to Basic mode with this XML in place, messages appear indicating that you must use Advanced mode. With this release, additional advanced configurations will now be included in this behavior.

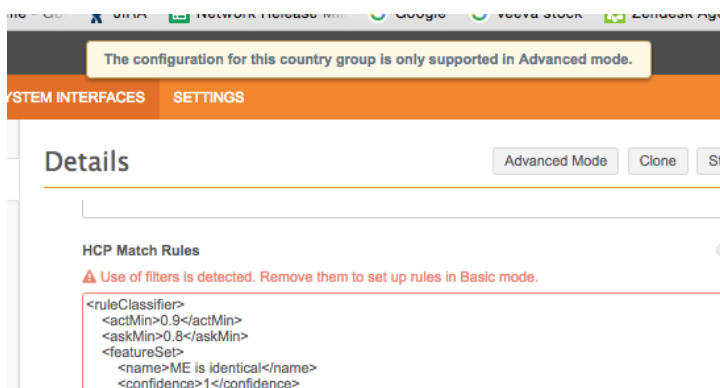
For example, the following rules include functionality that is only allowed in Advanced mode:

```

<feature>
  <name>Street is the same</name>
  <collate>
    <set>
      <field>addresses__v</field>
      <filter>
        <field>thoroughfare__v</field>
        <value>George</value>
        <type>INCLUDE</type>
      </filter>
      <setIntersectionComparison>
        <collate>
          <direct>
            <field>thoroughfare__v</field>
            <equalComparison/>
          </direct>
        </collate>
      </setIntersectionComparison>
    </set>
  </collate>
</feature>

```

Trying to return to Basic mode results in the following messages in the match UI:





### MATCH ANALYSIS LOG

The following changes have been made to the match analysis log that you can export from within a source subscription:

- In address fields, a tilde (~) is now used to separate addresses instead of a carriage return.
- Some column names have been changed: *Master Instance* is now called *Instance*, and *Master VID* is now called *Number Match VID*.
- The Veeva IDs (VIDs) of matched addresses can be included. In your source subscription, click **Advanced Mode** and add the following line to the Module Properties:

```
"job.match.additionalColumns": "Match:addresses__v.vid__v"
```

### DATA GROUPS ANALYSIS LOG

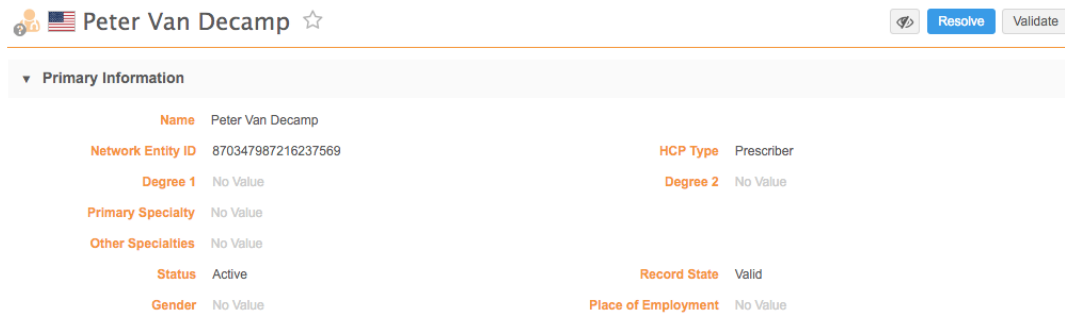
*Blockers* are now called *data groups*. The file name has changed to reflect the new name. For example, the HCO file name has changed to the following:

Previous name: <subscription\_name>HCO-BLOCK-ANALYSIS-<date>-job-xxx.csv

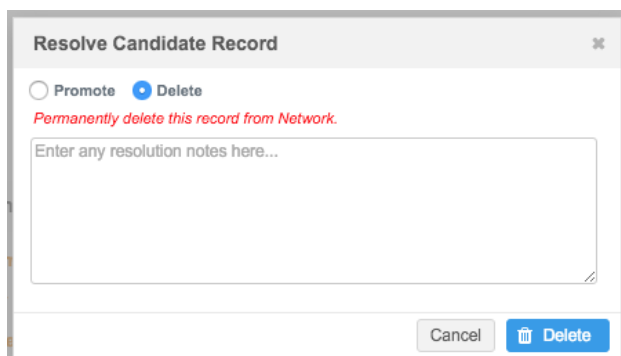
New name: <subscription\_name>HCO-DATA-GROUP-ANALYSIS-<date>-job-xxx.csv

## Candidate records

Data stewards can now resolve candidate records in a single action; the promote and delete actions have been combined in the **Resolve** button for a candidate record profile.



When a user clicks the **Resolve** button, the **Resolve** dialog provides the options to delete or promote the record.





As before, the **Delete** radio button permanently deletes the record from the Network instance, and the **Promote** radio button promotes it to valid record status.

**Resolve Candidate Record**

Promote  Delete

Promoting this record will make it available to target systems through exports and API calls.

Enter any resolution notes here...

Cancel Promote

The promoted record will be available to downstream systems through data exports or API calls.

### Primary affiliations and addresses

Where multiple affiliations or addresses are set to primary in a source feed, one of the affiliations or addresses found is set to primary for each.

The rules for determining a primary address or affiliation from a source feed are as follows:

- a single active address or affiliation is set as the primary
- if the source, timestamps, and ordinals (addresses only) of two or more addresses or affiliations are the same, set the address or affiliation with the newest Veeva ID as primary
- if multiple affiliations or addresses are set to primary in a source feed, one of the affiliations or addresses is set to primary

### Managing DCRs for third party systems

In order to effectively and more seamlessly work with externally managed data, you can now import and export data change requests for third party master systems. You export DCRs for use by the third party provider, and similarly import them for subsequent use in Network.

**Note:** You can only update existing DCRs by file import; you cannot create new DCRs.

#### EXPORTING DATA CHANGE REQUESTS

You export third party data change requests in a target subscription for the third party system. When you configure the target subscription for the third party system, you indicate whether the subscription is to export data or DCRs.



The following steps highlight the parts of a subscription relating to DCRs; ensure that you also complete all mandatory fields for the subscription:

1. In the Admin console, select **System Interfaces > Target Subscriptions**. Note that the list of subscriptions includes a column that indicates whether the subscription exports data or DCRs.
2. Select a target subscription to update, or create a new one.
3. In the **System** drop down list, select a third party data source.
4. Select **DCR** from the **Type** drop down list. This indicates that the subscription exports DCRs for the third party system specified.
5. In the Export Options section, for **Full Data Extract**, select either **Full** or **Delta**. If you specify **Delta**, only DCRs that were created since the last run of the subscription are exported. If you select **Full**, all available DCRs are exported.
6. For **DCR Status**, select the status of DCRs to include for a full extract; for example, **All** or **Pending Only**. This option does not appear for delta extracts.
7. Click **Save** to save the subscription for later processing or click **Start Job** to run it immediately.

When the subscription runs, DCR fields are filtered according to the selected third party master system; only fields that are externally mastered are included in the exported DCR file. Fields mastered by customer data stewards (gray fields) are filtered out. The corresponding DCR file is stored in the Outbound FTP folder by system and timestamp.

The job history for the subscription indicates the number of DCRs processed for each entity type along with the export path for the DCR files.

**Note:** During a DCR export, no data whatsoever (including data entities, source data, or reference data) is exported.

#### IMPORTING DATA CHANGE REQUESTS

You load third party data change requests along with the data update from the third party system. When you configure the source subscription for the third party data load, you can also indicate whether DCRs should also be loaded.

Before you begin, ensure that one or more DCR files, prefixed by DCR\_ in the file names, are stored in the Inbound FTP folder for your instance.

The following steps highlight the parts of a subscription relating to DCRs; ensure that you also complete all mandatory fields for the subscription:

1. In the Admin console, select **System Interfaces > Source Subscriptions**.
2. Select a source subscription to update, or create a new one.
3. In the source subscription, ensure that you have selected a third party data source in the **System** drop down list.
4. Select the **DCR Response File Provided** check box. This check box appears only if you have selected a third party system.
5. Click **Save** to save the subscription for later processing or click **Start Job** to run it immediately.





When the subscription runs, the DCR file or files provided are parsed and processed along with the data load. Statistics on the DCRs processed are provided in the data load summary when the job completes. A summary of accepted and rejected DCRs, by entity, is also provided.

#### ABOUT DCR FILES

Files for data change requests are stored in the Inbound FTP path prior to an import, or in the Outbound FTP path after an export. The following sections outline the layout and requirements for these files.

#### *DCR export files*

Exported files are stored in the Outbound FTP path for the target subscription, within a subfolder named for their corresponding third party system. Within the folder for the specified system, files are further divided by their time stamp.

On export, two files containing DCR information are saved to the Outbound path: the DCR header file and the DCR line items file. The DCR header file contains information at the entity level (for example, HCO, HCP, or Address) and the DCR line items file contains information for each field added or changed through the DCR.

The following tables outline the columns used for each file.

DCR header file:

Column Name	Explanation
DCR ID	Unique identifier of the DCR
DCR SECTION ID	Unique identifier of the DCR section (HCO, HCP, Address, Relation, or License)
DCR TYPE	Describes whether the DCR is an add request or a change request (ADD_REQUEST or CHANGE_REQUEST)
SUBJECT	Subject of the DCR
ENTITY TYPE	Type of added/changed Network entity (HCO, HCP, Address, Relation, License)
ENTITY ID	Unique identifier of the Network entity (can be NULL)
CUSTOM KEY SOURCE	Unique identifier of the third party master system (can be NULL)
CUSTOM KEY TYPE	Name of the entity in the third party master system (can be NULL)
CUSTOM KEY VALUE	Unique identifier of the entity in the third party master system (can be NULL)
RESULT	Final result of the DCR after the DCR is processed (CHANGE_ACCEPTED



Column Name	Explanation
	or CHANGE_REJECTED)
COMMENT	Comment by the third party data provider
DCR STATUS	Workflow status of the DCR in Network
CREATED AT	Date when the DCR was created
COMPLETED AT	Date when the DCR was completed
CREATOR	Network user name of the creator of the DCR
CREATOR NOTE	Notes by creator of the DCR
RESOLUTION NOTES	Workflow notes (system generated)
COUNTRY	Country to which the DCR belongs to

DCR line items file:

Column Name	Explanation
DCR ID	Unique identifier of the DCR
DCR SECTION ID	Unique identifier of the DCR section (HCO, HCP, Address, Relation, or License)
DCR TYPE	Describes whether the DCR is an add request or a change request (ADD_REQUEST or CHANGE_REQUEST)
SUBJECT	Subject of the DCR
ENTITY TYPE	Type of added/changed Network entity (HCO, HCP, Address, Relation, License)
ENTITY ID	Unique identifier of the Network entity (can be NULL)
CUSTOM KEY SOURCE	Unique identifier of the third party master system (can be NULL)
CUSTOM KEY TYPE	Name of the entity in the third party master system (can be NULL)
CUSTOM KEY VALUE	Unique identifier of the entity in the third party master system (can be NULL)
FIELD NAME	Name of the changed field
OLD VALUE	Field value before the requested change



Column Name	Explanation
CHANGE REQUESTED	New field value
FINAL VALUE	Final field value after the DCR is processed
FIELD STATUS	Final status of the field after the DCR is processed (CHANGE_ACCEPTED or CHANGE_REJECTED)

### *DCR import files*

The file names for DCR files provided in the Inbound FTP path for a source subscription must begin with "DCR\_". Any files whose names begin with this string will be imported with the source subscription for the third party data, if that subscription is configured to include DCR files.

The additional following considerations apply:

- Each DCR will only be processed once
- Master and custom keys must be provided when accepting DCRs
- File formats and column names are pre-defined
- Delimiters are hardcoded
- DCR import must occur with an incremental data update.

DCR response file:

Column Name	Explanation
DCR ID	Unique identifier of the DCR
DCR SECTION ID	Unique identifier of the DCR section (HCO, HCP, Address, Relation, or License)
DCR TYPE	Describes whether the DCR is an add request or a change request (ADD_REQUEST or CHANGE_REQUEST)
SUBJECT	Subject of the DCR
ENTITY TYPE	Type of added/changed Network entity (HCO, HCP, Address, Relation, License)
ENTITY ID	Unique identifier of the Network entity (can be NULL)
CUSTOM KEY SOURCE	Unique identifier of the third party master system (must be provided by third party provider)
CUSTOM KEY TYPE	Name of the entity in the third party master system (must be provided by third party provider)
CUSTOM KEY	Unique identifier of the entity in the third party master system (must be



Column Name	Explanation
VALUE	provided by third party provider)
RESULT	Final result of the DCR after the DCR is processed (CHANGE_ACCEPTED or CHANGE_REJECTED). Must be provided by third party provider.
COMMENT	Comment by the third party data provider

## Logging

### FTP ACTIVITY

The System Audit and Login Audit logs now contain user activity for Network FTP folders. Relevant activities are logged for auditing and can be downloaded in the CSV file.

The following FTP activities generate logs:

- Log in
- Uploading files
- Uploading folders with files.
- Renaming files and folders.
- Moving files and folders.
- Uploading folders or files with insufficient permission.
- Creating a new file with insufficient permission.
- Deleting a file with insufficient permission.

To view FTP activity in the system audit logs, in the Admin console, click **Logs > System Audit History**.

System Audit History

Quick history  or  To   Export to CSV

EVENT ID	TIMESTAMP	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	PROPERTY	NEW VALUE	OLD VALUE
928504178197528607	2016-06-23 16:57:27 EDT	customer.admin@uscustomer.veev...	QA_test_file.csv	Delete	FTPOperation			
928504178624402463	2016-06-23 16:57:03 EDT	customer.admin@uscustomer.veev...	File1a.csv	Delete	FTPOperation	Error Occurred. File1a.csv: Permissi...		
928504171821006879	2016-06-23 16:55:49 EDT	customer.admin@uscustomer.veev...		Renaming	FTPOperation		new_sub_dir1	new_sub_dir
928504169415376927	2016-06-23 16:55:13 EDT	customer.admin@uscustomer.veev...		Upload	FTPOperation	/dir1a/file123	Error Occurred. file123: Permission ...	
928504167411744799	2016-06-23 16:54:42 EDT	customer.admin@uscustomer.veev...		Renaming	FTPOperation		QA_test_file_rename.csv	QA_test_file_rename.csv

To view the FTP activity in the login logs, in the Admin console, click **Logs > Login Audit History**.

Login Audit History

Quick history  or  To   Export to CSV

TIMESTAMP	USER NAME	SOURCE IP	TYPE	STATUS	BROWSER	PLATFORM
2016-07-05 13:30:18 EDT	admin@veevanetwork.com	216.121.153.114	login	Success	Unknown	FTP-SSL
2016-07-05 13:25:29 EDT	steward1@veevanetwork.com	216.112.153.114	login	Success	Unknown	FTP-SSL
2016-07-05 13:18:50 EDT	lucy.steward@veevanetwork.com	216.211.153.114	User Login	Success	Chrome 51.0.2704.103	Intel Mac OS X 10.11.5



### TASK AUDIT HISTORY CONTAINS SYSTEM NAME

The task audit log message now includes the name of the third party master when a change request is routed to a master instance. The master system name is also included in the Change Request page.

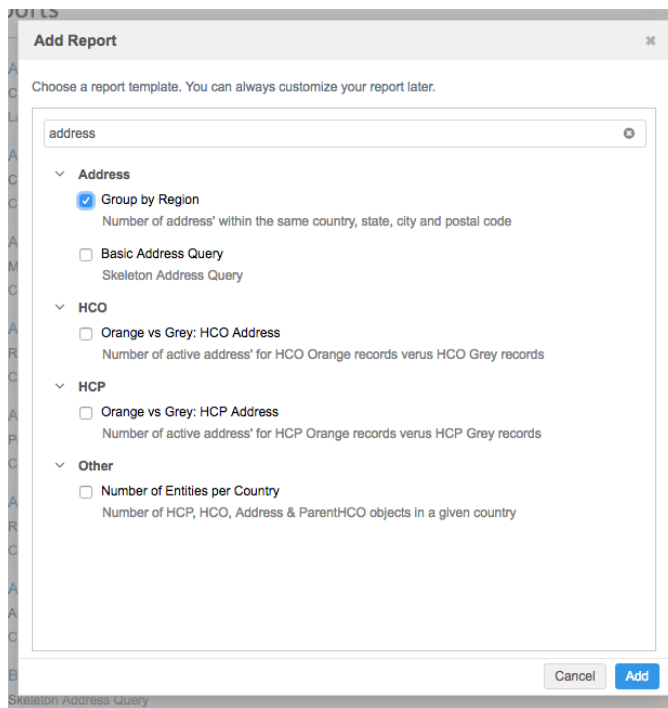
## Reporting

The following sections describe updates to Network Reporting for this release.

### REPORT TEMPLATES

From the All Reports page, when you click **Add Report**, the **Add Report** dialog enables you to use an existing report template to start with. Templates are available to data managers and administrators.

1. On the All Reports page, click **Add Report** to open the **Add Report** dialog.



2. Begin typing in the search field to refine the list of templates.
3. Select a template and click **Add**.

The report opens with the configuration for the template you specified. You can now customize and save the configuration as a new report.



### Group by Region

Number of address' within the same country, state, city and postal code

Created by customer1.admin@idemo.veevanetwork.com

Cancel Delete Copy Run Save

**▼ Schedule**

Enabled

**▼ Share Report**

Viewers

Editors

Send Email Notifications

⚠ Recipient(s) should add "network-emails@veevanetwork.com" to their Inbox Email Safe List.

**▼ Download Settings**

Reference  Description  Code

Save Results to FTP

**▼ Report Data**

Record Details Counts & Summaries **Advanced**

```

1 SELECT
2   country__v,
3   administrative_area__v,
4   locality__v,
5   postal_code__v,
6   COUNT (*)
7 FROM
8   address
9 GROUP BY
10  country__v,
11  administrative_area__v,
12  locality__v,
13  postal_code__v
    
```

Record State:

### UNMERGED HCO AND HCP REPORTS

The following report templates have been added so that you can review the entities that were unmerged from each other:

- Unmerged HCPs and HCOs – retrieves the list of unmerged HCPs and HCOs.
- Unmerged HCPs – compares the HCPs that were unmerged from each other.
- Unmerged HCOs – compares the HCOs that were unmerged from each other.

**Note:** Templates are available only to data managers and administrators, but can be shared with other users.

**Prerequisite:** Before users can run these reports, two new fields must be activated and your reporting engine must be updated.

To set up the reports:

1. In the Admin console, click **Data Model**.
2. In the Custom Key section, find the following fields:
  - custom\_key\_source\_key\_context\_\_v
  - custom\_key\_source\_key\_id\_\_v
3. To enable the fields, click the red (x) beside each field.
4. Contact Veeva Support to update your reporting engine. Support will update the engine so that it's functioning with historical unmerge data.

**Note:** After an unmerge, the changes are not available immediately to view in the unmerge reports. Your reporting engine must update before you can see the unmerged records in the report, typically within 24 hours.



To run an unmerge report:

1. In Reports, click **Add Report**.
2. Search for the unmerge report that you want to run.
3. Select the report and click **Add**.
4. When the report opens, you can customize and save the configuration as a new report.
5. Save and Run the report.

**Target subscription considerations:** After you enable the `custom_key_source_key_context__v` and `custom_key_source_key_id__v` fields for unmerge reporting, they are also available to use for new target subscriptions. You can use the exported files to do unmerge reporting on the fields in your downstream system. For more information about target subscriptions, see the *Online Help*.

### EXPORTED RESULTS

Previously, when you exported report results to a file, a backslash (\) was used as an escape character. Exported reports now use double quotation marks (") as the escape character.

### RESULTS LINKS

In the report results list, Network entity ID links to HCPs or HCOs change to reflect visited link style if the link has been visited during the user’s current session.

Results (1,000 records) 📄 🔄

Table Chart

NETWORK ENTITY ID	FIRST NAME	LAST NAME	PRIMARY COUNTRY	RECORD STATE	SPECIALTY 1	STATUS
<a href="#">847328899539928065</a>	Gary	Lyman	United States	Valid	Haematology (Internal Medicine)	Active
<a href="#">847328899573482496</a>	James	Ryan	United States	Valid	Haematology (Internal Medicine)	Active
<a href="#">847328899741254657</a>	Daniel	Kopp	United States	Valid	Family Medicine (Formerly FP)	Active
<a href="#">847328899816752128</a>	Celeste	Hollands	United States	Valid	General Surgery	Active
<a href="#">847328900034855936</a>	Ha	Tran	United States	Valid	Internal Medicine	Active
<a href="#">847328900085187584</a>	David	Crawford	United States	Valid	Diagnostic Radiology	Active
<a href="#">847328900546561025</a>	Dora	Pinkhasova	United States	Valid	Clinical Neurophysiology	Active
<a href="#">847328900580115457</a>	Oksana	Krichkova	United States	Valid	Psychiatry	Active

### PERFORMANCE IMPROVEMENTS

Performance improvements have been implemented across reporting pages, including the following:

- All Reports list
- Edit report
- Report result preview
- Data Quality Reports
- Data quality test case preview

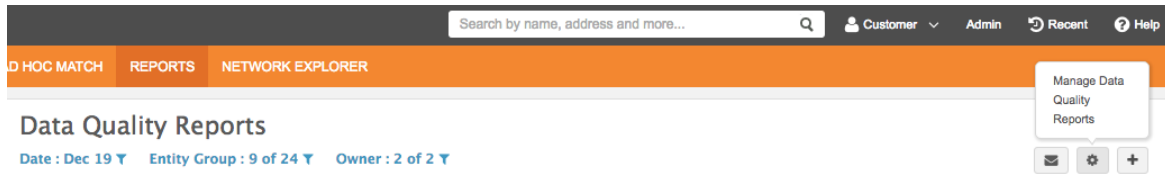
Load times on these pages has significantly improved.



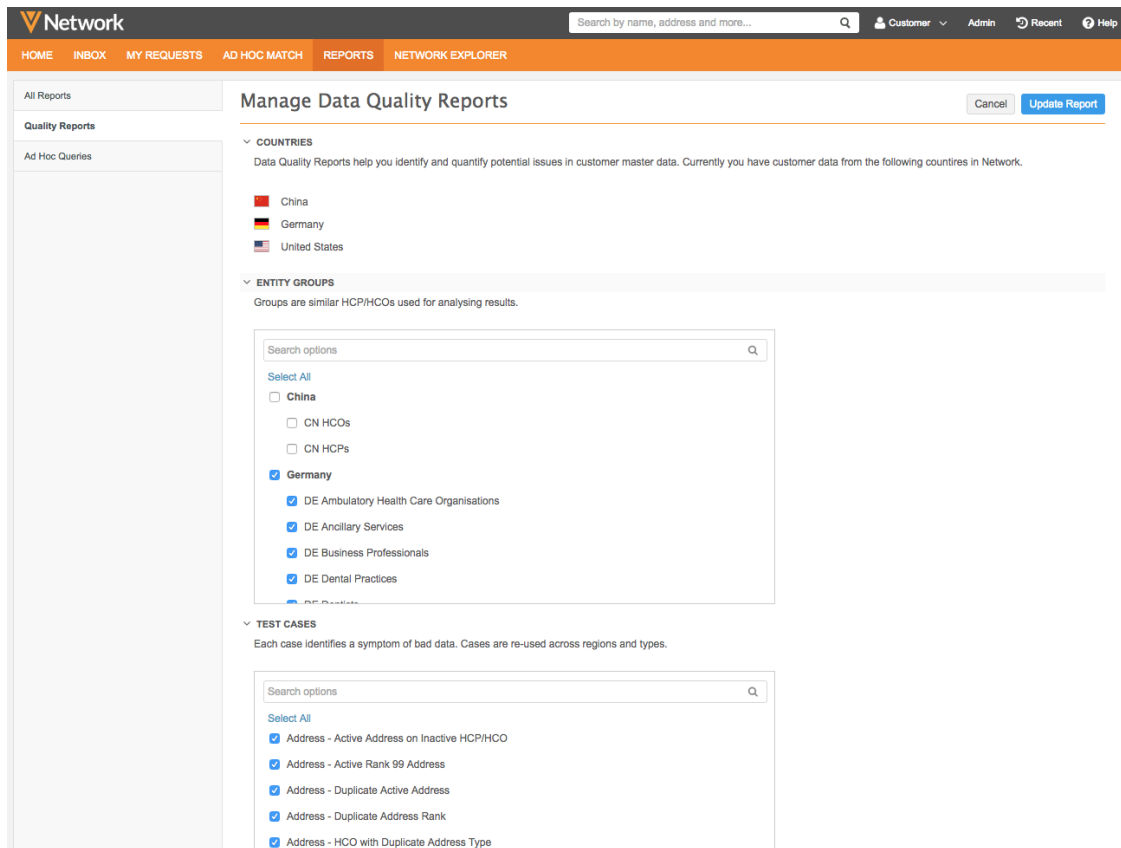
## Data Quality Reports

### DATA QUALITY REPORTS WIZARD

Data managers and administrators can rerun the data quality reports wizard by clicking the gear icon in the dashboard. This reruns the wizard and evaluates the test cases and entity groups that apply to the records in your Network instance.



You can choose to add or remove test cases based on data quality report templates. Custom test cases and entity groups are not affected.



After you've made changes to this screen, click the **Update Report** button to generate the new report.





## DASHBOARD

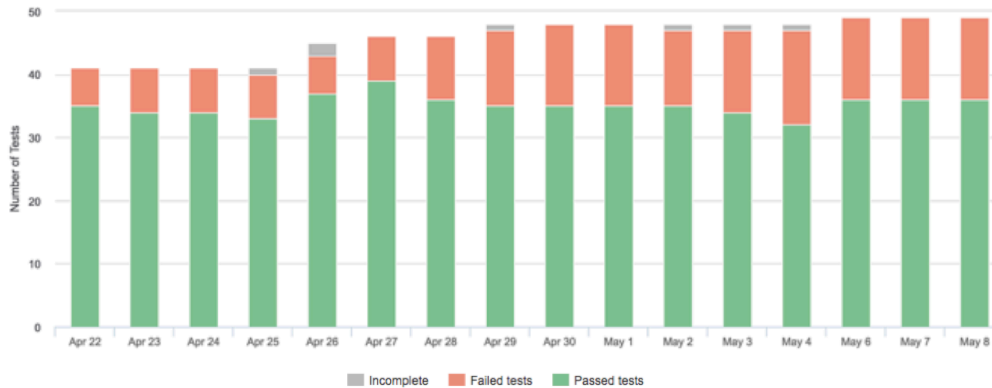
In the detailed list of test cases on the dashboard, test cases now display a percentage to indicate the proportion of records failing for a particular test case and entity group.

### Data Quality Reports

Date : May 12 Entity Group : 2 of 2 Owner : 2 of 2



#### SUMMARY



#### DETAILS

TEST CASES	US Animal Health HCPs	US Healthcare Business Profess...	US Non Prescribers	US Prescribers	US Transparency Reportable HCP...
NPI					
FAILED					
HCP - Duplicate NPIs (US)	✓	✗ 0.1%	✗ 0.002%	✗ 0.02%	✗ < 0.001%
HCP - Missing NPI (US)	✓	✓	✓	✗ 0.5%	✗ 1%

Note that the **Owner** filter now only appears for instances that include both Veeva OpenData and locally managed data.

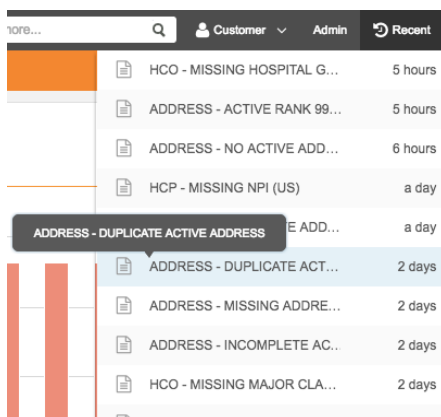
### Data Quality Reports

Date : Dec 19 Entity Group : 9 of 24 Owner : 2 of 2



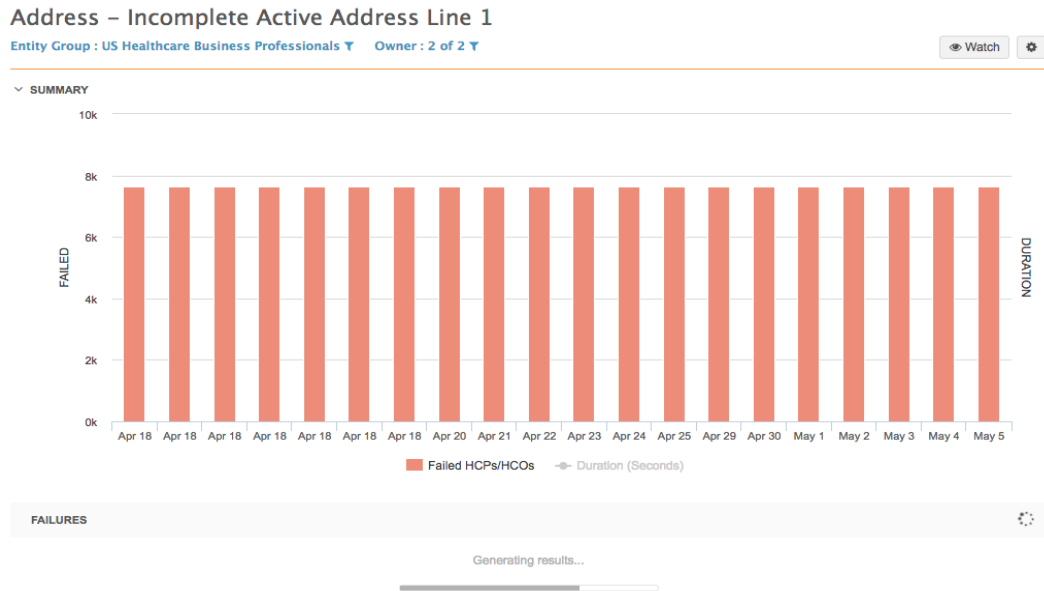
## TEST CASES

Test cases now appear in the history of recent items.





When you open a test case, a progress indicator now appears while the results list is loading.



## LOCALIZATION

Reports and report emails are now displayed in a user’s preferred language, for all languages currently supported in Network.

For other languages (as well as those already translated), users can customize or add translations at the bottom of the Test Group and Entity Group pages.

Relationship - Parent-Child Affiliation in Diffe...	May 13, 2016 6:12 AM	✓	<input checked="" type="checkbox"/>
Relationship - Practice with HCO Parent Affl...	May 13, 2016 6:12 AM	✓	<input checked="" type="checkbox"/>
Relationship - Practice with Multiple HCP Ch...	May 13, 2016 6:12 AM	✓	<input checked="" type="checkbox"/>
Relationship - Stand Alone Group Practices ...	May 13, 2016 6:11 AM	✓	<input checked="" type="checkbox"/>
Specialty - Duplicate Specialties	May 13, 2016 6:12 AM	✓	<input checked="" type="checkbox"/>
Specialty - Incorrect Order	May 13, 2016 6:13 AM	✓	<input checked="" type="checkbox"/>
Specialty - Missing Specialty	May 13, 2016 6:13 AM	✓	<input checked="" type="checkbox"/>
Specialty - Missing Specialty - Doctor	Never	–	<input type="checkbox"/>
Specialty - Missing Specialty - Prescribers O...	Never	–	<input type="checkbox"/>
Specialty - Missing Specialty Rank 1	May 13, 2016 6:13 AM	✓	<input checked="" type="checkbox"/>

+ Add Test Case

### LANGUAGE CONFIGURATION

Language	Name	Description	
German	DE Ärzte	Deutsche Ärzte	✕
English	DE Doctors	German Doctors	✕

Add Language



## Ad hoc queries

The following sections describe updates to ad hoc queries for this release.

### NEXT DATABASE UPDATE

The Ad Hoc Queries page now includes the next scheduled time for reporting database updates.

[Reports](#) > [Ad Hoc Queries](#)

### Ad Hoc Queries

Last Updated: Jun 10, 2016, 2:02am    Next Update: Jun 10, 2016, 2:02pm

Record Details	Counts & Summaries	Advanced
▼ REPORT TYPE		
NAME	DESCRIPTION	
HCP	Health Care Professionals with related address	

### FILTERS

You can now filter standard reports using multiple ID values (for example, vid\_\_v) or multiple values for string fields (for example, last\_name\_\_v).

On the Ad Hoc Queries page, in the **FILTERS** section, type one or more values for string fields in the **VALUE** column. When you type multiple values, a space, comma, or semicolon indicates a new value.

### Ad Hoc Queries

Last Updated: Dec 19, 2015, 7:54am

Save & Schedule [Run](#)

Record Details	Counts & Summaries	Advanced
▼ REPORT TYPE		
NAME	DESCRIPTION	
HCP	Health Care Professionals with related address, licenses and parent HCOs that best meet your criteria.	
HCO	Health Care Organizations with related address, licenses and parent HCOs that best meet your criteria.	
Reference Data	Reference Data details including type, region and translations.	
Change Request	You are not a member of any Inbox Task groups.	
Suspect Match	You are not a member of any Inbox Task groups.	

▼ COLUMNS

Available Columns	Selected Columns
<ul style="list-style-type: none"> <li>▶ HCP</li> <li>▶ Address</li> <li>▶ License</li> <li>▶ Custom Key</li> <li>▶ Relationship (ParentHCO)</li> <li>▶ Parent HCO</li> <li>▶ Parent HCO Primary Address</li> </ul>	<ul style="list-style-type: none"> <li>▼ HCP                             <ul style="list-style-type: none"> <li>Network Entity ID</li> <li>First Name</li> <li>Last Name</li> <li>Primary Country</li> <li>Record State</li> <li>Specialty 1</li> <li>Status</li> </ul> </li> </ul>

▼ FILTERS

FIELD	CONDITION	VALUE	AND/OR
Last Name	Find	smith wang	

[+ Add Filter](#)



Similarly, for ID fields, type one or more values in the **VALUE** column for the ID:

▼ FILTERS

FIELD	CONDITION	VALUE	AND/OR
Network Entity ID	In	243080055507387394 ✕ 243038717655122949 ✕ 243135126475637769 ✕	

+ Add Filter

### FORMAT ADVANCED QUERIES

The Advanced Query editor now provides an option to format queries in the editor. From the **Advanced** tab, click the **Format** button at the bottom of the editor to format code.

#### Ad Hoc Queries

Last Updated: Dec 19, 2015, 7:54am

Load Save & Schedule Run

Record Details Counts & Summaries **Advanced**

```
1 SELECT vid__v, corporate_name__v, major_class_of_trade__v, hco_type__v, hco_status__v, created_date__v, modified_date__v, primary_country__v, is_veeva_ma
```

Format code (Ctrl+m)

The query is properly indented.

#### Ad Hoc Queries

Last Updated: Dec 19, 2015, 7:54am

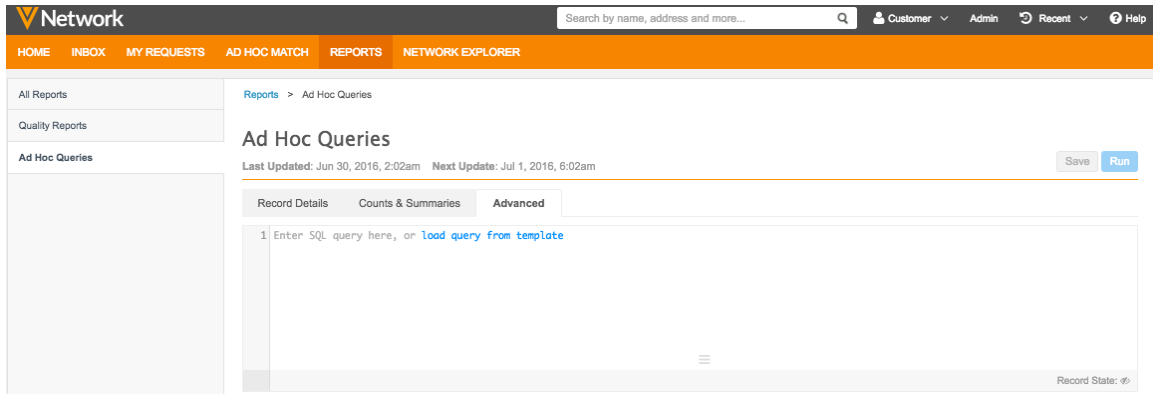
Load Save & Schedule Run

Record Details Counts & Summaries **Advanced**

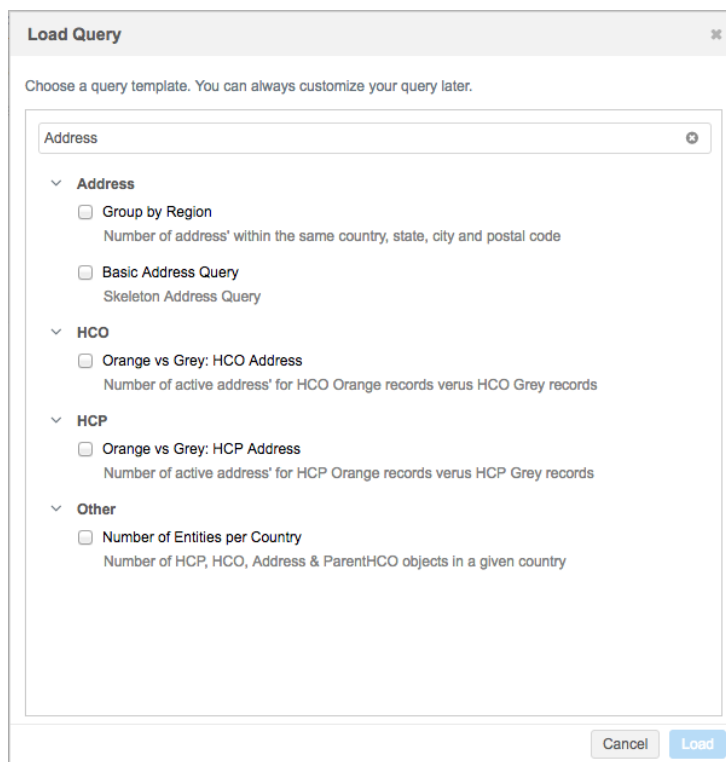
```
1 SELECT
2     vid__v,
3     corporate_name__v,
4     major_class_of_trade__v,
5     hco_type__v,
6     hco_status__v,
7     created_date__v,
8     modified_date__v,
9     primary_country__v,
10    is_veeva_master__v
11 FROM
12     hco
```

### ADVANCED QUERY TEMPLATE

Data managers and administrators can now load queries from a template while using the Advanced query option.



1. From the editor, click the load query from template link to open the **Load Query** dialog.



2. Begin typing in the search field to refine the list of templates.
3. Select a template and click **Load** to load that query in the editor.

The code for that query is loaded into the query editor.



## Ad Hoc Queries

Last Updated: Jun 30, 2016, 2:02am Next Update: Jul 1, 2016, 6:02am

Save Run

Record Details Counts & Summaries **Advanced**

```

1 SELECT
2     country__v,
3     administrative_area__v,
4     locality__v,
5     postal_code__v,
6     COUNT (*)
7 FROM
8     address
9 GROUP BY
10    country__v,
11    administrative_area__v,
12    locality__v,
13    postal_code__v
    
```

Record State:

### Address inheritance

Network address inheritance enables you to apply the address of a parent HCO to its child HCP or HCO address for all records in an instance. Address inheritance must be enabled by Veeva and configured by an administrator for the instance.

By default, all fields are copied from the parent address with the exception of custom fields. Mandatory fields must be included when address fields are inherited. Address ordinals are not inherited from the parent address.

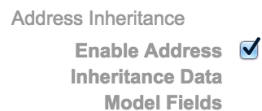
**Note:** Customer-defined Network address inheritance does not apply to master-owned records.

#### ENABLE ADDRESS INHERITANCE

When users enable address inheritance data model fields, the `parent_address_vid__v` and `parent_address_sync__v` fields are automatically enabled in the data model.

An administrator enables address inheritance in the general settings:

1. In the Admin console, select **Settings**.
2. On the General Settings page, click **Edit**.
3. In the **Address Inheritance** section, select the check box.



4. Click **Save**.



The fields required for address inheritance are enabled in the data model:

**Network Data Model**  
Country: All countries Export Create Custom Field

Field Name	Label	Field Type	Reference	Status
latitude__v	Latitude	Decimal number		✓
locality__v	City	Text		✓
longitude__v	Longitude	Decimal number		✓
modified_date__v	Modified Date	Date & time		✓
organization__v	Organization	Text		✓
organization_name__v	Organization Name	Text		✓
organization_type__v	Organization Type	Text		✓
parent_address_sync__v	Parent Address Sync	Reference Type	ParentAddressSyncReference	✓
parent_address_vid__v	Parent Address vid	Veeva ID		✓
phone_10__v	Phone 10	Text		✓

The reference codes for the parent\_address\_sync\_\_v are as follows:

Reference Codes - ParentAddressSyncReference

Country: All countries Export

NETWORK CODE	NETWORK NAME	DEFINITION	ACTIVE?
D	Disqualified	System setting that indicates the previously sync copy address should no longer exist.	✓
R	Re-sync	Sync with parent address if exists. Does not disqualify the copy address if the parent address is not eligible.	✓
S	Synced	Sync with parent address if exists. Disqualify the copy address if the parent address is not eligible.	✓
U	Unsynced	Breaks the sync with the parent address for copy address.	✓

CONFIGURE ADDRESS INHERITANCE

Administrators can configure specific behavior for address inheritance:

1. In the Admin console, select **Data Model > Network Address Inheritance**. The Network Address Inheritance page displays the current configuration for address inheritance for the instance.



## Network Address Inheritance

Cancel Add Save

▼ Countries United States ✕

▼ HCP - HCO HIERARCHY TYPE

HCP Type Prescriber ✕

Relationship Type Affiliation ✕

Parent HCO Type Organization, Dept at Hospital ✕  
Organization, Clinic at Hospital ✕

Parent Address Type Professional ✕

▼ HCO - HCO HIERARCHY TYPE

HCO Type Organization, Dept at Hospital ✕  
Organization, Clinic at Hospital ✕

Relationship Type Affiliation ✕

Parent HCO Type Organization, Group at Hospital ✕  
Organization, Health System ✕ Organization, Hospital ✕

Parent Address Type Professional ✕

2. In the **Countries** field, type one or more countries to include in the configuration. As you type, options are auto-filled. To remove a country, click the **x** to the right of the country name.
3. Expand the **Country** section to see the configuration for HCPs and HCOs.
4. Within each section, specify values for each of the types.
5. In the **Address Fields Sync** section, select fields in the **Available Columns** pane and click the **>** button to add them to the list of fields to include when addresses are updated.

▼ ADDRESS FIELDS SYNC

Available Columns	Selected Columns
Phone 1 (phone_1__v)	Address Delivery Type (record_type__v)
	Address Line 1 (address_line_1__v)
	Address Line 2 (address_line_2__v)
	Address Line 3 (address_line_3__v)
	Address Type (address_type__v)
	Address Verification Status (address_verific...
	Building (building__v)
	Building Leading Type (building_leading_typ...
	Building Name (building_name__v)
	Building Trailing Type (building_trailing_type...
	CBSA (cbsa__v)
	City (locality__v)
	Congressional District (congressional_distric...
	Country (country__v)





6. To remove fields, select fields in the **Selected Columns** pane and click the < button to remove them from the list of fields to include.
7. Click the << or >> buttons to remove or add all fields.
8. To specify additional configurations for other countries, click the **+Add Countries** link at the bottom of the page.

**Note:** You cannot remove mandatory address fields from the **Selected Columns** pane.

#### ADDRESS INHERITANCE CONFIGURATION

The Network Address Inheritance page enables you to include a null value for hierarchy types and more easily select all hierarchy types. Use a null value if data is missing for HCP or Relation type fields so address inheritance can be applied to a record.

To select null values or all values for address inheritance:

1. In the Admin console, select **Data Model > Network Address Inheritance**. The Network Address Inheritance page displays the current configuration for address inheritance for the instance.

**Network Address Inheritance** Cancel Add Save

▼ Countries ?  ✕

▼ HCP - HCO HIERARCHY TYPE

HCP Type  ✕

Relationship Type  ✕

Parent HCO Type  ✕

Parent Address Type   ✕

2. In each of the **Type** fields, perform one or both of the following actions:
  - Begin typing `No Value` and select the auto-completed value. You cannot leave a field blank to specify a null value.
  - Begin typing `All Reference Values` and select the auto-completed value.

Note that if you select both values, all types (including null values) will be included in address inheritance.

You can now define fields to synchronize separately for each type (HCP/HCO).



▼ HCP - HCO HIERARCHY TYPE

HCP Type

Relationship Type

Parent HCO Type

Parent Address Type

▼ ADDRESS FIELDS SYNC

Available Columns		Selected Columns
Address Line 3 (address_line_3__v)		Address Line 1 (address_line_1__v)
Address Verification Status (address_verific...		Address Type (address_type__v)
Building (building__v)		City (locality__v)
Building Leading Type (building_leading_typ...		Country (country__v)
Building Name (building_name__v)		Premise Number (premise_number__v)
Building Trailing Type (building_trailing_type...	»	Primary Zip Code (postal_code_primary__v)
CBSA (cbsa__v)	>	State (administrative_area__v)
Congressional District (congressional_distric...	<	Status (address_status__v)
DPV Confirmed Indicator (dpv_confirmed_in...	«	Thoroughfare (thoroughfare__v)
DPV Footnotes (dpv_footnotes__v)		Zip Code (postal_code__v)
Delivery Address (delivery_address__v)		
Delivery Address Line 1 (delivery_address_...		
Delivery Address Line 2 (delivery_address_...		
Delivery Address Line 3 (delivery_address_...		
Delivery Point Bar Code (delivery_point_bar...		

▼ HCO - HCO HIERARCHY TYPE

HCO Type

Relationship Type

Parent HCO Type

Parent Address Type

▼ ADDRESS FIELDS SYNC

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)		City (locality__v)
Address Verification Status (address_verific...		Country (country__v)
Building (building__v)		Premise Number (premise_number__v)
Building Leading Type (building_leading_typ...	»	Primary Zip Code (postal_code_primary__v)
Building Name (building_name__v)	>	State (administrative_area__v)
Building Trailing Type (building_trailing_type...	<	Status (address_status__v)
CBSA (cbsa__v)	«	Thoroughfare (thoroughfare__v)
Congressional District (congressional_distric...		Zip Code (postal_code__v)
DPV Confirmed Indicator (dpv_confirmed_in...		
DPV Footnotes (dpv_footnotes__v)		
Delivery Address (delivery_address__v)		
Delivery Address Line 1 (delivery_address_...		

**Note:** The address\_verification\_status\_\_v field is now enabled by default. If you change address data, the data becomes out of sync with the parent data. To sync the data again, verify the address in the change request, or use the **Sync** icon or **Verify** button in the address section of the Profile page.



## Inherit address behavior

Depending on the fields configured for address inheritance, addresses can become unsynchronized from the parent address when users modify the inherited address.

You can hover over the address on the profile page and click **Re-Sync** to synchronize the address with the parent HCO address.

**Carol Moore** ☆

1149 Dogwood St Burlington North Carolina 27217-8064 US  
**Network Entity ID:** 242979931531772933  
**Phone:** 6479674833  
**License:** PA RN223652L  
**Modified Date:** 2016-04-29 15:52:30

**Primary Information**

**Network Entity ID:** 242979931531772933  
**Address copied from:** Unsynced  
**Primary Country:** United States   
**Record State:** Valid  
**Website:** Add URL

**Addresses**

- Moncks Corner Health Department**  
 109 W Main St Moncks Corner South Carolina 29461-2673  
**Network Entity ID:** 242976942679131137  
**AMS ID:** 8270361  
[Re-Sync](#)
- Professional** 109 W Main St Moncks Corner South Carolina 29461-2673 US 3
- Professional** 200 Main St New York New York 10044 US 4
- Professional** 100 Main St New York New York 10044 US 5

[Add Address](#) [show inactive](#)

**Parent HCO Affiliations** Sort by: Name ↑

- Corporate Name:** NAI 2016  
 201 Main St New York NY 10044  
 Network Entity ID: 903344962349827072
- Hierarchy Type:** Individual to Organization Affiliation
- Relationship Type:** Affiliation

If the parent HCO relationship is inactivated or the record no longer meets address inheritance configuration criteria, the address is updated as Disqualified.

When data stewards approve synchronized fields on an inherited address, a warning appears in the change request page.



Inbox > Change Request - Carol Moore

### Change Request

Re-assign Reject Save Apply

All Fields DCR Fields

	Current Value	Change Request	Approved?
<div style="border: 1px solid black; padding: 2px;">                     Updating a synced copied address will break the link to its original address.                 </div>			
> ADDRESS 3	🔗 Copied synced address		
Address Type	🔗 Professional	Mail Only	⚠️ ✓ ✕ ✎
Address Line 1 *	🔗 200 Main St	No Value	
Address Line 2	🔗	No Value	
Address Line 3	🔗	No Value	
City *	🔗 New York	No Value	
State	🔗 New York	No Value	
Zip Code	🔗 10044	No Value	
Country	🔗 United States	No Value	
Address Rank	4	No Value	

Data stewards get warnings when approving synced fields on an inherited address.

You can establish links between parent addresses and inherited addresses for existing records by updating `parent_address_vid__v` and `parent_address_sync__v` through a data load.

**Note:** Updates for inherited addresses are triggered by the record itself; changes to the parent address are not automatically reflected in child objects inheriting the address.

#### ENABLE ADDRESS INHERITANCE ON DATA LOAD

After address inheritance is enabled for an instance, you perform a data load to update relevant records with their corresponding parent record’s address.

In a source subscription, an administrator must enable address inheritance for the data load in the subscription’s module properties.

1. In the Admin console, select **System Interfaces > Source Subscriptions**.
2. Select a source subscription and click **Advanced Mode**.
3. In the **Edit Module Properties** dialog, add or update the following property:

```
"job.nai.enabled": "true"
```

4. Click **Ok**.
5. Click **Save**.

When the subscription runs, addresses are updated with inherited values.



VIEWING ADDRESS INHERITANCE AUDIT HISTORY

Network tracks changes made that involve address inheritance so that administrators can identify these types of changes and understand why data has changed.

System Audit History

Quick history Date range To

Select time period... or 2015-11-15 2015-11-16 Get History

[Export to CSV](#)

TIMESTAMP	EVENT ID	USER NAME	ITEM	EVENT DESCRIPTION	OBJECT TYPE	
2015-11-16 10:07:27 EST	786277066923312128	system.admin.3.1@network.com	default	Edit	WorkflowSettings	create
2015-11-16 10:07:27 EST	786277066923312128	system.admin.3.1@network.com	default	Edit	WorkflowSettings	review
2015-11-16 10:07:27 EST	786277066923312128	system.admin.3.1@network.com	default	Edit	WorkflowSettings	review
2015-11-16 10:07:27 EST	786277066923312128	system.admin.3.1@network.com	default	Edit	WorkflowSettings	review
2015-11-16 10:07:27 EST	786277066923312128	system.admin.3.1@network.com	default	Edit	WorkflowSettings	autoAf
2015-11-16 10:07:27 EST	786277066923312128	system.admin.3.1@network.com	default	Edit	WorkflowSettings	autoAf
2015-11-16 10:07:27 EST	786277066923312128	system.admin.3.1@network.com	default	Edit	WorkflowSettings	autoAf
2015-11-16 10:07:27 EST	786277066923312128	system.admin.3.1@network.com	default	Edit	WorkflowSettings	autoAf
2015-11-16 10:07:27 EST	786277066923312128	system.admin.3.1@network.com	default	Edit	WorkflowSettings	autoAf

Displaying 1 to 9 of 9

CONSIDERATIONS FOR CHINESE INSTANCES

For Chinese instances, if a user adds a new parent HCO relationship to a Chinese record (where the primary country is set to China) for a parent HCO that is not Chinese, a warning message is displayed.

▼ Parent Affiliations

Corporate Name

Relationship Type

New Parent Affiliation

Parent Type: -

Status: Active

Primary Relationship?: -

**Warning**

Data model discrepancy detected. Can't inherit address from parent with different data model.

Do you want to proceed?



## Workflow

---

### ENABLE CHILD OBJECT COMPARISON

When creating change requests, new child objects are compared to existing objects in order to avoid duplication. By default, the status of these objects is ignored, which means active addresses can be considered a match to an inactive address when other fields within the records also match.

Because inactive addresses are not visible to end users (sales reps), addresses they create that match incoming inactive addresses will result in a change request, rather than an “under review” address.

To avoid having change requests produced as a result of a match between an active and inactive address, the workflow settings enable you to include the status in the comparison. Consequently, active and inactive addresses will not be matched and new addresses will be flagged as UNDER\_REVIEW as expected.

To update child object settings, on the Workflow Settings page:

- In the **Overwrite Child Object Comparison** section, perform one of the following:
  - select **Include Status** for an object to consider the object’s status during match
  - select **Exclude Status** for an object to ignore the object’s status during match



- Click **Save**.

## Veeva Network Connector for Concur

---

### CONCUR CONNECTOR

Administrators can configure the Veeva Network Connector for Concur directly from the Network user interface. To access the connector, in the Admin console, click **System Interfaces > Concur Connector**.

**Note:** The Concur Connector is an optional module. For more information, contact your account executive or Veeva Support.



The following activities are available:

- Enable and disable the connector. The connector is disabled by default and must be enabled by an administrator.
- Define the attendee type code that is used in Concur. The type code is required to ensure that all Veeva OpenData records added to expenses in Concur are added to your Network instance.
- Configure Concur connection settings.
- Test your connection.
- Review the mappings between fields in Network and Concur. The mappings are read-only. To change the mappings, contact Veeva Support.

**Concur Connector** Cancel Save

---

**System**

Connector Enabled  Yes  No

System

Attendee Type Code

Download HCPs from OpenData

**Connection Settings**

Concur User

Password

**Field Mappings**

CONCUR FIELD	NETWORK FIELD	CONCUR DATA TYPE	LENGTH
<input type="text" value="LastName"/>	last_name__v	<input type="text" value="TEXT"/>	100
<input type="text" value="FirstName"/>	first_name__v	<input type="text" value="TEXT"/>	100
<input type="text" value="Title"/>	prefix__v	<input type="text" value="TEXT"/>	100
<input type="text" value="Company"/>	corporate_name__v	<input type="text" value="TEXT"/>	100
<input type="text" value="ExternalID"/>	vid__v	<input type="text" value="TEXT"/>	100
<input type="text" value="Custom13"/>	medical_degree_1__v	<input type="text" value="TEXT"/>	100

### SEARCH VEEVA OPENDATA

Users can now search all Veeva OpenData records for HCPs to add as attendees for expense reports. Any Veeva OpenData records that are added to an expense are automatically added to your Network customer master instance.

**Note:** Veeva OpenData records are only returned in search results if your Concur integration user’s data visibility profile permits searching in Veeva OpenData.

For more information about using Concur with Network, see the *Veeva Network Connector for Concur Technical Brief*.



## Data visibility profile

### MANDATORY FIELDS

Fields that affect data visibility profiles are included in the DCR Enabled Fields list for third party master systems (**System Interfaces > System**). These fields cannot be removed from the list.

▼ DCR Enabled Fields

**Available Fields** Q

Search available fields

▼ Address

- Address Delivery Type (record\_type\_\_v)
- Address Line 1 (address\_line\_1\_\_v)
- Address Line 2 (address\_line\_2\_\_v)
- Address Line 3 (address\_line\_3\_\_v)
- Address Rank (address\_ordinal\_\_v)
- Address Type (address\_type\_\_v)
- Address Verification Status (address\_verificati...
- Building (building\_\_v)
- Building Leading Type (building\_leading\_type...
- Building Name (building\_name\_\_v)
- Building Trailing Type (building\_trailing\_type ...)

**Selected Fields** Q

- ▼ HCO
  - Primary Country (primary\_country\_\_v)
  - HCO Type (hco\_type\_\_v)
- ▼ HCP
  - Primary Country (primary\_country\_\_v)
  - HCP Type (hcp\_type\_\_v)

» > < «

Select which fields are DCR enabled for a particular third party data provider.

### PAGE LAYOUT NAMES

The USStandard page layout is renamed NAStandard so that it can be used for United States and Canadian profiles.

Page Layout

HCP Page Layout NAStandard

HCO Page Layout NAStandard

## Reference data

### FILTERS

Filters you define on the Reference Data page are now retained when you return to that page after performing other actions. For example, if you set a filter to only show active reference types and then add or update a reference type, when you return to the main Reference Data page, the filters will retain the setting to display active reference types.

### INACTIVATE REFERENCE CODES

You can now inactivate reference codes that you don't need. This functionality is only allowed for a given country if an instance does not subscribe to Veeva OpenData for that country.

1. In the Admin console, select **Data Model > Reference Data**.
2. On the Reference Type Summary page, select a reference type.
3. On the Reference Codes page, click **Export** to export the codes for that type.





4. Update the exported spreadsheet by adding country codes to the **Active Countries** or **Inactive Countries** columns.
5. Import the updated spreadsheet by clicking **Import** and using the Reference Data Importer.

When you view the page for a specific reference code, the active and inactive countries appear in the **Countries** section.

Reference Type Summary > LicenseDEAPaymentIndicator > P

P
Cancel

---

▼ Details

**Network Code**

**Definition**

A DEA fee payment is required for every institution or individual who is not fee exempt due to being operated by an agency of the US, any US state, or an individual employed by and working at that institution

**Countries** Active:

United States

Inactive:

Andorra

Argentina

Austria

Australia

Belgium

Brazil

Belarus

Canada

Switzerland

China

Czech Republic

Germany

Denmark

Spain

Finland

France

United Kingdom

Greece

Hungary

Ireland

Iceland

Italy

Japan

Kazakhstan

Luxembourg

Monaco

Mexico

Netherlands

Norway

New Zealand

Poland

Portugal

Russian Federation

Sweden

Slovenia

Slovakia

Turkey

Ukraine

Other Countries

### Job details

The following information has been added to the **Overview** section for source and target subscription jobs:

- **System:** The name of the related system.
- **Started By:** The user name that triggered a manual job.
- **Path:** The FTP path that was used to import the files.



Job Details (ID: 10) Cancel Job

---

**Overview**

System	ETL	Subscription	CustomerOwned
Start Time	2015-03-25T13:44:00-04:00	Duration	a minute
Current Stage	FinalStage	Percent Complete	100.00%
Outcome	COMPLETE	Started By	Stan Wong
Number of Files Processed	5	Number of Bad Records	75
Path	outbound/VCRRMDemoREB2/NetworkBridge2/exp_00000462.zip		

## Secure FTP

---

When you access folders on your FTP server, Secure File Transfer Protocol (SFTP) is now supported. The following IP ranges must be whitelisted first:

Production and Sandbox: 209.207.232.96/27, 128.242.235.192/27

Auth IP: 209/207.232.80/28, 128.242.235.240/28

The outbound port is 56922.

Note that FTPS (FTPS-SSL) is still supported.

## Performance

---

The performance of search typeahead has improved. The top five results display more quickly when you are searching for HCP and HCP records.

## General enhancements

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### MENU TEXT

For larger screens, the **Help** and **Recent** menu items provide text next to their corresponding icons. Reduced screen sizes display the icons only.



## API

---

The following APIs have been updated for this release. For more detailed information, visit <http://developer.veevanetwork.com/>.



## RETRIEVE CHANGE REQUEST AND CHANGE REQUEST BATCH RETRIEVE

The Retrieve Change Request and Change Request Batch Retrieve API now allow the following parameters:

- **sinceDate** – Include change requests modified after the specified date (exclusive). This value is specified in epoch time in milliseconds.
- **toDate** – Include change requests modified on or before the specified date (inclusive). This value is specified in epoch time in milliseconds.

## CHANGE REQUEST MATCH

The Change Request Match API enables you to match a request to an existing entity. You can use either the Veeva ID or custom key of an existing entity to match the request against.

This API uses the following syntax:

```
https://dns/api/version/change_request/match/change_request_id
```

where:

- *dns* – the URL for the API service
- *version* – the API version
- *change\_request\_id* – the ID of the change request to process

### Parameters

- **vidKey** (required) – the external HCP or HCO vid\_key or the Veeva ID of the entity
- **Comment** (optional) – Notes added by the Network user

### Sample requests

```
POST https://my.veevanetwork.com/api/v9.0/change_request/match/542116772438868992?vidKey=847328898944336896
```

```
POST https://my.veevanetwork.com/api/v9.0/change_request/match/542116772438868992?vidKey=Network:Entity:1325540&comment=comments
```

### Response

- **responseStatus** - the status of the automatic response generated by Network upon reception of the change request and all of its fields
- **change\_request\_id** - the ID of the change request generated in Network

### Sample response

```
{
  "responseStatus": "SUCCESS",
  "change_request_id": 542116772438868992
}
```

## RETRIEVE ENTITY

The Retrieve Entity API enables you to obtain information on any entity without identifying the specific entity type. This API is only used to retrieve information from Network using the GET method.

This API uses the following syntax:

```
https://dns/api/version/entity/vid_key
```



where:

- *dns* – the URL for the API service
- *version* – the API version
- *vid\_key* – the key of the entity to retrieve

Parameters

- *systemName* (optional) – If provided, Network returns target alias values specified for reference value codes for the system. If system is not provided, Network returns default reference value codes.

Sample requests

```
GET https://my.veevanetwork.com/api/v9.0/entity/Network:Entity:63259874100112525
```

Response

- *responseStatus* - the status of the automatic response generated by Network upon reception of the change request and all of its fields
- *entities* – an array of attribute information objects:
  - *entityId* – the Network ID of the entity
  - *entityType* – the entity type
  - *metaData* – not applicable; included for structure
  - *entity* – the entity containing all attributes

Sample response

```
{
  "responseStatus": "SUCCESS",
  "entities": [
    {
      "entityId": "505659322685034497",
      "entityType": "HCP",
      "metaData": {},
      "entity": {
        "attribute 1": "Value 1",
        "attribute 2": "Value 2",
        " ... ": " ... ",
        "custom_keys__v": [
          {
            "attribute 1": "Value 1",
            "attribute 2": "Value 2",
            " ... ": " ... "
          }
        ]
      },
      "addresses__v": [
        {
          "attribute 1": "Value 1",
          "attribute 2": "Value 2",
          " ... ": " ... ",
          "custom_keys__v": [
            {
              "attribute 1": "Value 1",
              "attribute 2": "Value 2",
              " ... ": " ... "
            }
          ]
        }
      ]
    }
  ]
}
```





## Parameters

- **systemName (optional)** – If provided, Network returns target alias values specified for reference value codes for the system. If system is not provided, Network returns default reference value codes.

## Sample requests

```
GET https://my.veevanetwork.com/api/v9.0/child/Network:Address:847332583464240130
```

## Response

- **responseStatus** - the status of the automatic response generated by Network upon reception of the change request and all of its fields
- **entities** – an array of attribute information objects:
  - **entityId** – the Network ID of the child entity
  - **entityType** – the entity type
  - **metaData** – not applicable; included for structure
  - **entity** – the entity containing all attributes

## Sample response

```
{
  "responseStatus": "SUCCESS",
  "entities": [
    {
      "entityId": "847332583464240130",
      "entityType": "ADDRESS",
      "metaData": {},
      "entity": {
        "record_state__v": "VALID",
        "delivery_address_1__v": "愚园路786号",
        "thoroughfare_name__v": "愚园",
        "premise_number__v": "786号",
        "postal_code__v": "50",
        "administrative_area__v": "CN-SH",
        "ISO_3166_n__v": "156",
        "thoroughfare_trailing_type__v": "路",
        "delivery_address__v": "愚园路786号",
        "sub_administrative_area__v": "长宁区",
        "is_veeva_master__v": true,
        "dpv_confirmed_indicator__v": "X",
        "premise__v": "786号",
        "entity_vid__v": "847332077438239745",
        "ISO_3166_3__v": "CHN",
        "status_update_time__v": "2016-02-08T14:47:57.000-08:00",
        "thoroughfare__v": "愚园路",
        "address_line_2__v": "Shanghai上海市愚园路786号",
        "created_date__v": "2016-02-08T14:47:57.000-08:00",
        "address_verification_status__v": "A",
        "vid__v": "847332583464240130",
        "postal_code_primary__v": "50",
        "formatted_address__v": "50 Shanghai上海市愚园路786号",
        "address_line_1__v": "50",
        "entity_type__v": "HCO",

```



```

    "country__v": "CN",
    "modified_date__v": "2016-02-08T14:47:57.000-08:00",
    "address_ordinal__v": 1,
    "locality__v": "上海市",
    "address_status__v": "A",
    "record_delta_id__v": "847390011362903043"
  }
}
]
}

```

### BATCH RETRIEVE CHILD ENTITIES

The Batch Retrieve Child Entities API enables you to obtain information on child entities without identifying the specific entity type.

This API uses the following syntax:

```
https://dns/api/version/children/batch
```

where:

- *dns* – the URL for the API service
- *version* – the API version

Parameters

- *entities* (required) – An array of attribute information objects, including *vid\_key* (required), which is the external HCP or HCO *vid\_key* supplied by the client.
- *systemName* (optional) – If provided, Network returns target alias values specified for reference value codes for the system. If system is not provided, Network returns default reference value codes.

### Sample requests

```
POST https://my.veevanetwork.com/api/v9.0/child/batch
```

Post data:

```

{
  "entities": [
    {
      "vid_key": "Network:License:847332542603330562"
    },
    {
      "vid_key": "Network:License:847332542603330562"
    },
    {
      "vid_key": "Network:Address:847332583464240130"
    },
    {
      "vid_key": "Network:License:847329970740003846xx"
    }
  ]
}

```



## Response

- **responseStatus** - the status of the automatic response generated by Network upon reception of the change request and all of its fields
- **errors** – an array of attribute information objects:
  - **type** – the error type
  - **message** – detailed message for the error type
- **entities** – an array of attribute information objects:
  - **entityType** – the entity type
  - **metaData** – not applicable; included for structure
  - **entity** – the entity containing all attributes

## Sample response

```
{
  "responseStatus": "PARTIAL_SUCCESS",
  "errors": [
    {
      "type": "INVALID_DATA",
      "message": "No entity found with the given Id
Network:License:847329970740003846xx"
    }
  ],
  "entities": [
    {
      "entityId": "847332542603330562",
      "entityType": "LICENSE",
      "metaData": {},
      "entity": {
        "record_state__v": "VALID",
        "entity_vid__v": "847332072858059779",
        "status_update_time__v": "2016-02-08T14:47:57.000-08:00",
        "created_date__v": "2016-02-08T14:47:57.000-08:00",
        "vid__v": "847332542603330562",
        "entity_type__v": "HCP",
        "license_status__v": "A",
        "modified_date__v": "2016-02-08T14:47:57.000-08:00",
        "license_number__v": "210441581000032",
        "type__v": "PLC",
        "record_delta_id__v": "847390010448544774",
        "is_veeva_master__v": true
      }
    },
    {
      "entityId": "847332583464240130",
      "entityType": "ADDRESS",
      "metaData": {},
      "entity": {
        "record_state__v": "VALID",
        "delivery_address_1__v": "愚园路786号",
        "thoroughfare_name__v": "愚园",
        "premise_number__v": "786号",
        "postal_code__v": "50",
        "administrative_area__v": "CN-SH",
        "ISO_3166_n__v": "156",
      }
    }
  ]
}
```





```

    "thoroughfare_trailing_type__v": "路",
    "delivery_address__v": "愚园路786号",
    "sub_administrative_area__v": "长宁区",
    "is_veeva_master__v": true,
    "dpv_confirmed_indicator__v": "X",
    "premise__v": "786号",
    "entity_vid__v": "847332077438239745",
    "ISO_3166_3__v": "CHN",
    "status_update_time__v": "2016-02-08T14:47:57.000-08:00",
    "thoroughfare__v": "愚园路",
    "address_line_2__v": "Shanghai上海市愚园路786号",
    "created_date__v": "2016-02-08T14:47:57.000-08:00",
    "address_verification_status__v": "A",
    "vid__v": "847332583464240130",
    "postal_code_primary__v": "50",
    "formatted_address__v": "50 Shanghai上海市愚园路786号",
    "address_line_1__v": "50",
    "entity_type__v": "HCO",
    "country__v": "CN",
    "modified_date__v": "2016-02-08T14:47:57.000-08:00",
    "address_ordinal__v": 1,
    "locality__v": "上海市",
    "address_status__v": "A",
    "record_delta_id__v": "847390011362903043"
  }
}
]
}

```

## ERROR CODES

The following error codes have been added for System Interface APIs to advise integrations about retrying the API call when the dataflow server is not available, is slow or not responding, or an error occurred:

- **SERVER\_NOT\_AVAILABLE:** The internal (dataflow) server cannot be reached. It may be down for maintenance or a connection may have failed. The API call can be retried.
- **SERVER\_NOT\_RESPONDING:** The internal (dataflow) server accepted the request but is not responding. The operation is in progress but may be taking longer than usual. The API call should not be retried.

If any other error occurs, the API call has failed and can be retried.