



Veeva Network

Veeva Network 10.0.0.1 Release Notes

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Release Note updates

The following topics have been added to the Release Notes since the Sandbox version was published:

- **Veeva OpenData** - Searching Veeva OpenData now returns results from all countries where users have subscriptions.
- **Reference values** - In a profile, the behavior of reference field dropdown lists has been enhanced for usability.

All material in the Release Notes should be reviewed to ensure that updates to existing topics are noted.

What's new

The following key enhancements have been introduced in Veeva Network since 9.5.2:

CONFIGURATION MANAGEMENT

- **Exporting configurations** - Administrators can export configuration details for an environment for comparison purposes.

NETWORK EXPLORER

- **Edit mode** - Data stewards and data managers can now add and update hierarchies directly on the Network Explorer canvas.
- **View mode** - New enhancements to filters and settings can be used by all users when viewing the canvas.

DATA MODEL

- **Extended data model** - Customers can now use Veeva-owned fields.

REFERENCE DATA

- **Reference code status updates** - Improvements to the user interface ensure status consistency.
- **Reference code translations** - Handling duplicate translations between customer-owned and Veeva-owned translations is improved.

PROFILES

- **Map view** - A map to display the location of the entity address is available.
- **Custom keys** - Custom keys on child objects can now be viewed.
- **Reference values** - The display behavior of reference field values has changed.



SEARCH

- **Map view** - Search results can be displayed on a map.
- **Filters** - Search results can now be filtered on Major Class of Trade.
- **Veeva OpenData** - Users will now retrieve search results for all countries where they have Veeva OpenData subscriptions.

DATA EXPORT

- **Target subscriptions** - Administrators can filter on the parent HCOs using the group condition filters.
- **FTP path** - The FTP path for the exported file can be defined for each subscription.

CHANGE REQUESTS

- **Parent HCO updates** - The primary address of parent HCOs and a link to the profile is added to DCRs.
- **Task notification** - Data stewards are notified if they open a task that is assigned to another data steward.
- **Suspect match details** - The creator and comments for suspect match are added to DCRs.

CUSTOM KEYS

- **Duplicate custom keys** - Records containing duplicate keys are rejected on initial data load.

MATCH

- **Substring updates** - The match rules basic UI supports identifying matches from within or from the end of a substring.

AD HOC MATCH

- **Log updates** - The log file contains two additional columns to show the match feature set and features that matched.

DATA LOAD

- **Match log filter** - Users can filter the match log to see only ACT, ASK, or No Match results.
- **FTP path** - The FTP path can be defined for each subscription.

REPORTS

- **Job statistics** - Administrators and data managers can run reports and receive email notifications on job statistics.
- **Match log reports** - Reports can now be run on the match logs from source subscriptions.



DATA QUALITY REPORTS

- **Entity groups** - Administrators can clone an entity group to make a similar group.

CONCUR CONNECTOR

- **Personalize search** - Administrators can now choose to personalize Concur search results according to a Concur user's language and country.

DATA VISIBILITY PROFILES

- **Page layout** - A page layout is added for New Zealand data.

USERS

- **Integration User** - the *API-Only* user is renamed to *Integration User* and new FTP and API permissions are introduced.
- **Additional permissions** - Data stewards and standard users can be given permission to advanced features.
- **Password lengths** - Administrators can enforce minimum password lengths up to 24 characters.

SANCTIONS DATA

- **New fields** - Fields have been added so that users can load and view sanctions data that is available to customers who subscribe to Veeva OpenData in the United States.

API

- **Change request** - Several changes have been made to the API to support the DCR Queue feature.
- **Search** - The Search API are updated to include `filterByLocation` and `sortByLocation` parameters and the System Settings API.

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 9.5.1 and 9.5.2:

CHANGE REQUESTS

- **DCR queue** - Change requests can now be submitted on unverified records and are given an In Queue status.
- **Associated requests** - Requests for an HCP or HCO are grouped in the Associated Requests table on the Change Request page.



- **Copy** - Data stewards can now copy values in change requests.

DATA EXPORT

- **Target subscriptions** - Administrators now have more control over the data that is exported to downstream systems.

MATCH

- **Match analysis log** - The match log can now contain specific fields and includes data group information.
- **Match rules substrings** - Use the advanced substring command to identify substrings from the middle or end of a text string.
- **Data Group Analysis log** - Users can choose the type of entity for the log.

DATA LOAD

- **Survivorship** - The last updated time on a record can be used to calculate survivorship during data load.
- **Advanced properties** - By default source subscriptions add new customer-managed addresses, licenses, and relationships to master records if they are not already found on a master record.

DATA VALIDATION

- **Rules** - Use data validation rules to proactively manage data quality and completeness.
- **Inactive reference codes** - Codes inactive for a specific country are now available to the other selected countries in the rule.

REFERENCE DATA

- **Reference data status** - A new version of the reference data includes status information this is independent from country information.

DATA VISIBILITY PROFILES

- **Ad hoc match permissions** - Define permissions for ad hoc matching using data visibility profiles.

LOGGING

- **Search Audit History** - Searches are now audited and available for download.
- **Task Audit History** - This log is now available in the Logs section of the Admin console.

REPORTS

- **Email option** - A notify option is available when a report is run.
- **Navigation changes** - Choose report types from the Network menu bar.



- **Job summary reports** - New reports are available for source subscription and target subscription job details.

CONCUR CONNECTOR

- **Field mappings** - Use the Concur Connector UI to map Concur fields to Network fields.

MY PROFILE

- **User password change** - Users can now change their password from their user profile.
- **Opt-out of report emails** - Users can choose not to receive emails about reports.

API

- **Reference data types** - The Retrieve Reference Data Types and Retrieve Reference Data Type Details metadata API are updated to support If-Modified-Since.



About these Release Notes

These Release Notes describe all features included in Veeva Network 10.0.0.1.

Browser requirements

The following are the minimum browser requirements:

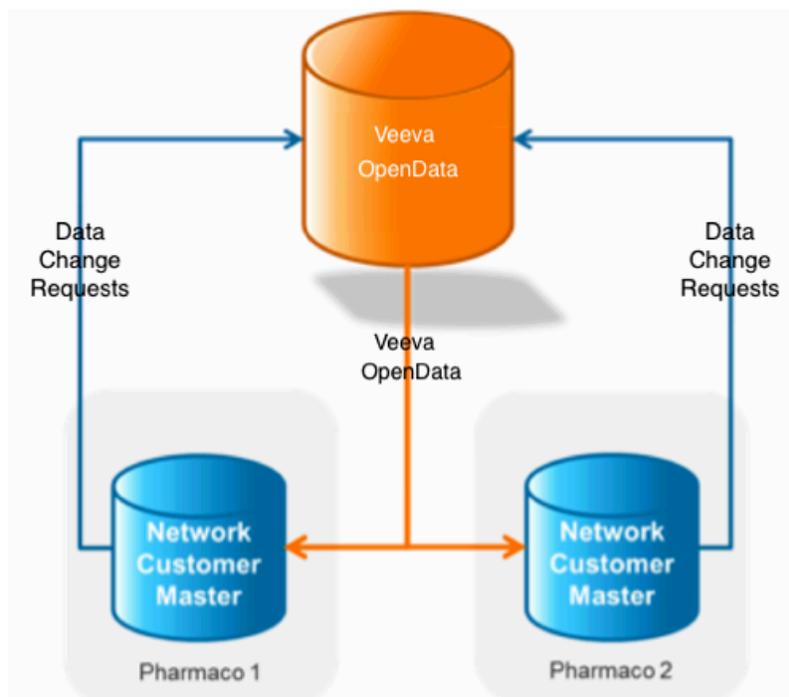
- Internet Explorer 11+
- Google Chrome (most stable version at Network release)
- Safari 6+

Introduction

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

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.

Configuration management

Understanding the differences between a test environment and a production environment is not always clear. Now, administrators can export configuration records as JSON files from their environments and compare them to discover any differences or missing records in their production environment.

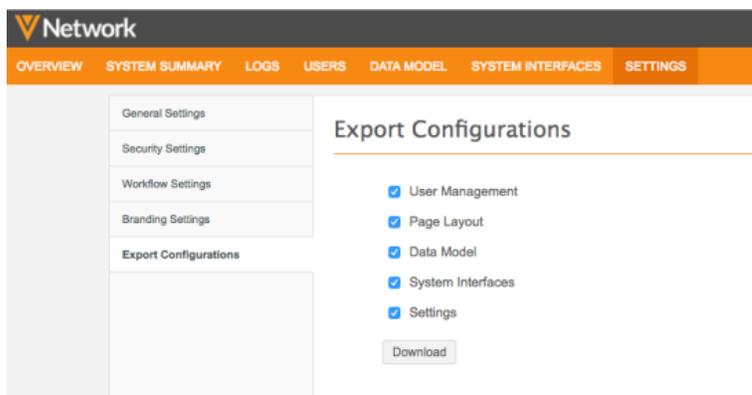
The configuration management feature is enabled by default.

EXPORT CONFIGURATIONS

Administrators can select the configurations to export. The configuration records that you choose to download contain information that you can use to compare the two environments.

To export configuration records:

1. In the Admin console, click **Settings > Export Configurations**.



2. On the Export Configurations page, select the configuration categories that you want to export. By default, all of the categories are selected.



Each category contains the following feature configurations:

- **User Management**
 - Data visibility profiles
 - Inbox task groups
- **Page Layouts**
 - Page layouts
- **Data Model**
 - Custom fields
 - Veeva fields
 - Custom reference types
 - Custom reference values
 - Network address inheritance rules
- **System Interfaces**
 - System definitions
 - Source subscriptions (including match configurations and NEX rules)
 - Target subscriptions
 - Third party subscriptions
 - Reference aliases
 - Veeva OpenData subscriptions
 - Default match configurations
 - Adhoc match configurations
 - Source rankings
 - Concur settings
- **Settings**
 - Workflow settings
 - General settings
 - Security settings
 - SSO settings

3. Click **Download**.

The exported file is downloaded in a compressed archive file with the following naming convention: ConfigExport_<instance_ID>_<timestamp>_GMT.zip.

Exported file contents

The compressed archive includes the following files:

- A JSON file for each of the configuration categories that you selected to export.

The content is sorted by configuration record and code, in alphabetical order. The order is static so the text can be easily compared when using a third party tool like Diff Checker.

- A file called *manifest.txt* that contains metadata information.



The *manifest* file includes the following information:

- Source environment (domain ID and instance ID)
- Environment type (sandbox or production)
- Export timestamp
- User who exported the file
- Export format version
- Source environment version
- Feature version for each feature

CONFIGURATION EXPORT

The configuration records that you choose to download contain information that you can use to compare the two environments. Each text file is organized by feature configuration.

Feature configurations are the properties defined and used by a feature.

Configuration records are the individual records saved to the database.

Example

In the *SystemInterfaces.json* file, the **System Definitions** feature configuration contains the data for the source systems defined in the Network instance. The source system called `TR` is an individual configuration record.

The screenshot shows the Veeva Network interface. At the top, there is a navigation bar with tabs for MARY, LOGS, USERS, DATA MODEL, SYSTEM INTERFACES, and SETTINGS. Below this, there is a sidebar with various system management options. The main content area displays a table titled 'Systems' with columns for NAME, DESCRIPTION, THIRD PARTY MASTER, and PROPRIETARY. The table lists three systems: 'change_request', 'my_third_party_system', and 'TR'. An arrow points from the 'TR' row in the table to a code editor window titled 'SystemInterfaces.json'. The code editor shows a JSON object with 'metaData' and 'data' sections. The 'data' section contains an array of system definitions, with one entry for 'TR' that includes a 'code' field.

NAME	DESCRIPTION	THIRD PARTY MASTER	PROPRIETARY
change_request	Data Change Request Data	<input type="checkbox"/>	<input type="checkbox"/>
my_third_party_system	Test system used for exporting / importing DCRs	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TR	TR	<input checked="" type="checkbox"/>	<input type="checkbox"/>

```
{
  "metaData": {
    "type": "System Definitions",
    "version": "1.0"
  },
  "data": [
    {
      "name": "TR",
      "masterId": "000056672939003648",
      "type": 3,
      "desc": "TR",
      "properties": "{\"uic.readonly\": \"false\", \"uic.hidden\": \"false\", \"source.restricted\": \"false\", \"source.unmergeable\": \"UNMERGE_NONE\", \"source.proprietary\": \"false\"}",
      "code": "TR"
    }
  ]
}
```

Codes and feature versions have been added to the text files to help with comparisons.

Code

A code is assigned to each configuration record so that it is uniquely identified. This code is generated automatically based on the name or other identifying attributes, depending on the feature configuration.



```
SystemInterfaces.json
{
  "metaData": {
    "type": "System Definitions",
    "version": 1.0
  },
  "data": [
    {
      "name": "TR",
      "masterId": 988696672939883648,
      "type": 3,
      "desc": "TR",
      "properties": [{"uic.readonly": "false", "uic.hide": "false", "source.restricted": "false",
        "source.unavailable": "UNPERGE_MONE", "source.proprietary": "false"}],
      "code": "TR"
    }
  ]
}
```

For most configuration records, the attributes used for code generation cannot be changed so the same code is created each time Network processes the exported file. For example, for the Veeva field **Email 1**, the code `email_1__v` is generated each time you export the configuration. However, if the attributes can change; for example, subscription names because they are defined by users, Network creates the code and persists it in the database. The code does not change even if the name changes. If the name of a configuration record conflicts with an existing code, an incremental counter is added to a code.

Example

- A source description named **Data Load A** is created. The generated code is `data_load_a__c`.
- The source subscription is renamed to **Data Load B**. The generated code remains `data_load_a__c`.
- A second source subscription is created and is named **Data Load A**. The generated code is `data_load_a_1__c`.

The generated code is displayed in the UI for configuration records where the code is persisted in the database. These records include source and target subscription names, inbox task groups, and data visibility profiles.



Feature version

Each feature is assigned a version number so that future changes can be tracked for compatibility. All of the features start at version 1.0 and will be incremented each time a new enhancement of the feature is released.

```
SystemInterfaces.json
{
  "metaData": {
    "type": "Source Subscriptions",
    "version": 1.0
  },
  "data": [
    {
      "customerID": 0,
      "countryID": 0,
      "sourceName": "TR",
      "name": "TR",
      "type": 0,
      "desc": "TR",
      "moduleProperties": [{"feed.url": "file:///\\", "native.key.RELATIONSHIP": "trig__v",
        "job.match.export": "true", "job.match.networkMasterLinkage": "false",
        "job.merge.sourceAction": "local", "archive.provider": "xslt", "feed.item.alias.ADDRESS": ""}
    ]
  ]
}
```



Network Explorer

The following topics detail the enhancements for the Network Explorer feature in this release.

EDITING IN NETWORK EXPLORER

The ability to edit is now available in Network Explorer for data stewards and data managers. This enables these users to create a brand new hierarchy or update an existing hierarchy using existing entities and edit root entity fields on the Network Explorer canvas. By editing directly on the canvas, users can visualize their changes instantly - especially if they are making changes on multiple records.

Enable edit mode

When you access Network Explorer, a ribbon with various editing tools is available to use.

To access the ribbon, click the **Edit Existing Canvas** button in the top right corner. The ribbon contains several editing buttons. Use these buttons to make changes to entities and affiliations on the canvas.

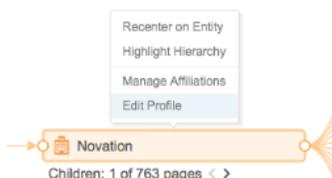


Edit a profile

The root entity fields on a profile (for example, fields in the **Primary Information** and **Education** sections) can now be modified directly from Network Explorer. This enables data stewards and data managers to make changes while they are referencing hierarchical relationships.

To edit a profile:

1. On the Network Explorer canvas, click the **Edit Existing Canvas** button.
2. Click on an entity.
3. In the action menu, select **Edit Profile**.



The profile opens in the right pane of the canvas. All of the root entity fields can be edited, except the affiliations. Affiliations can be edited directly on the canvas. Child object (address, license, and parent HCO) fields cannot be edited.

4. Hover your cursor on any field to highlight the field and display the **Edit** icon.



5. Make your changes and click the **Save** button.

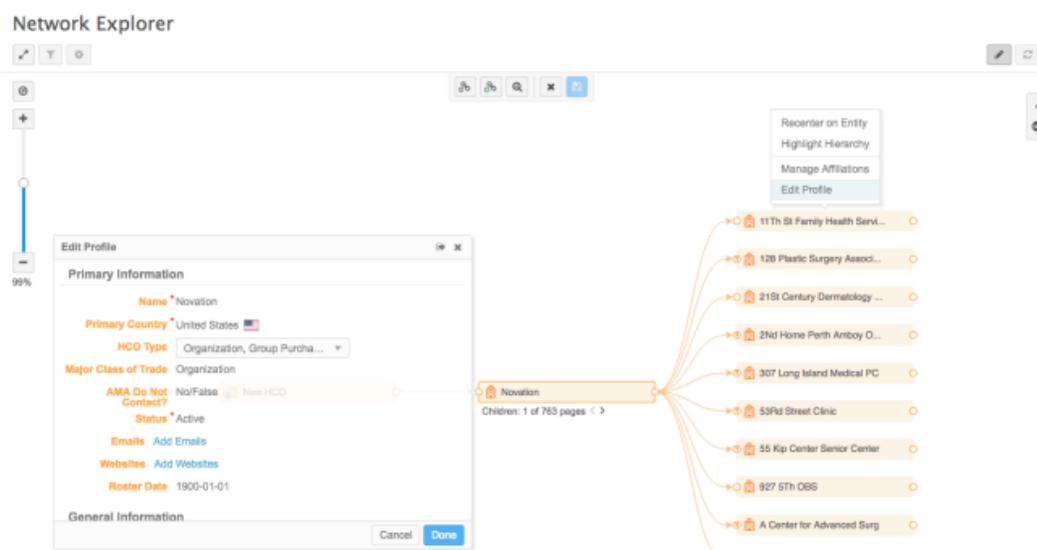
When you click **Save**, a change request is submitted. As soon as the change request has been auto-approved the changes are reflected on the profile.

Undock

When you are editing a profile, you can remove it from the right pane of the canvas by clicking the **Undock** button.



The **Edit Profile** window displays beside the entity. This option is useful if you want to have multiple profiles open for editing.



Creating parent affiliations

Data stewards and data managers can create parent affiliations between two entities that are on the Network Explorer canvas.

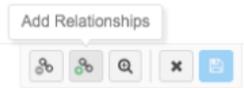
When a new parent affiliation is created, existing relationships to parents and children are preserved.

To create a parent affiliation:

1. Open Network Explorer to view an existing hierarchy.
2. On the top right of the canvas, click the **Edit Existing Canvas** button.
3. Add a relationship using one of two ways:



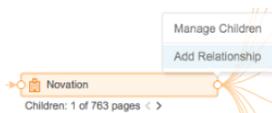
- a. On the editing ribbon, click the **Add Relationships** button. Click a circle on the right or left side of an entity and draw a line to another entity on the canvas. A dotted line displays between the two entities.



You can create multiple relationships in sequence when this button is active. Right-click on the canvas to inactivate the button.

or

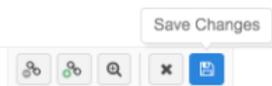
- b. On an entity, right-click the unfilled circle on the left or right of the entity. Select **Add Relationship**. Draw a line from the entity to another entity on the canvas.



If the circle is filled, click it to expand the existing affiliations.

- 4. In the **Add Relationship** dialog, specify the details of the parent affiliation.

- 5. To save your changes, click **Done**.
- 6. Click the **Save Changes** button on the canvas.



A change request for the child entity is submitted.

Edit a parent relationship

Parent affiliations can be managed from Network Explorer. Updating existing relationships on the Network Explorer canvas enables users to visualize the changes while they're looking at the hierarchy.

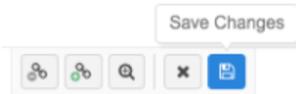


To edit a parent affiliation:

1. Open Network Explorer to view an existing hierarchy.
2. Click the **Edit Existing Canvas** button in the top right corner.
3. On the canvas, click the connecting line between two entities.
4. Select **Edit Relationship**.



5. In the **Edit Relationship** dialog, click any of the fields to edit the value.
6. To save your changes, click **Done**.
7. Click the **Save Changes** button on the canvas. A change request for the child entity is submitted.



INACTIVATE A PARENT RELATIONSHIP

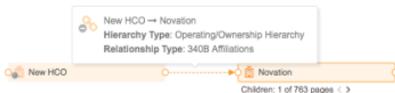
Parent affiliations can be managed from Network Explorer. You can inactivate a single parent affiliation, or you can inactivate multiple relationships on the canvas.

Inactivate one parent affiliation

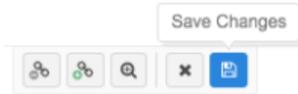
1. Open Network Explorer to view an existing hierarchy.
2. Click the **Edit Existing Canvas** button in the top right corner.
3. On the canvas, right-click the solid connecting line between two entities.
4. Select **Inactivate Relationship**.



The solid connecting line between the two entities becomes dashed. When you hover the cursor over the link, the relationship icon is updated to show that it is inactive.

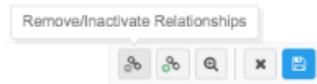


5. To save your changes, click **Done**.
6. Click the **Save Changes** button on the canvas. A change request for the child entity is submitted.



Inactivate multiple parent relationships in a sequence

1. On the Network Explorer canvas, click the **Edit Existing Canvas** button in the top right corner.
2. On the editing ribbon, click the **Remove/Inactivate Relationships** button.

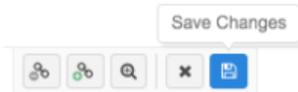


This button remains active until you right-click on the canvas.

3. Click the solid connecting line between two entities on the canvas. The line becomes dashed when the relationship between the two entities is inactivated.

To inactivate the relationship between other entities, click the connecting lines.

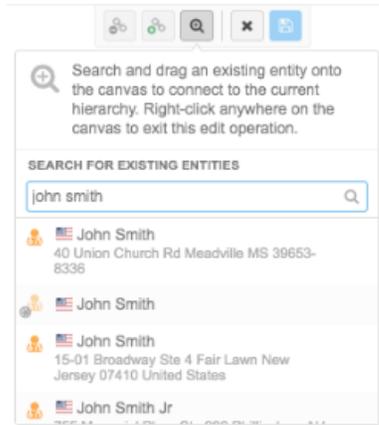
4. When you have finished, right-click on the canvas to stop editing relationships and exit the edit operation.
5. Click the **Save Changes** button on the canvas. Change requests for the affected child entities are submitted.



Adding entities to a hierarchy

A new hierarchy can be created or an existing hierarchy can be updated to include existing entities. Editing the hierarchies on the canvas, instead of within individual profiles, enables users to visualize the relationships.

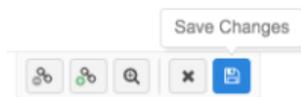
1. On the Network Explorer canvas, click the **Edit Existing Canvas** button in the top right corner.
2. On the editing ribbon, click the **Add Elements** button.



3. In the **Search For Existing Entities** dialog, search for an entity that you want to add to the hierarchy.
4. Select an entity to add it to the canvas.
5. On the left or right side of the entity, select the outer circle that is connected to the entity with a dotted line and drag it to another entity on the canvas to create a relationship (either child or parent).



6. The Add Relationship dialog displays so that you can add the details required for the affiliation between the two entities.
7. Click **Done** to save your changes.
8. Click the **Save Changes** button on the canvas. Change requests for the affected child entities are submitted.



SAVING CHANGES

When you save the changes that you make on the canvas, click the **Save Changes** button on the ribbon. A summary and details of the changes can be viewed before you submit the changes. A separate DCR is created for each profile change that you make.





After you click **Save**, the Save Progress window displays at the bottom of the canvas. Use this window to track the progress of your changes.



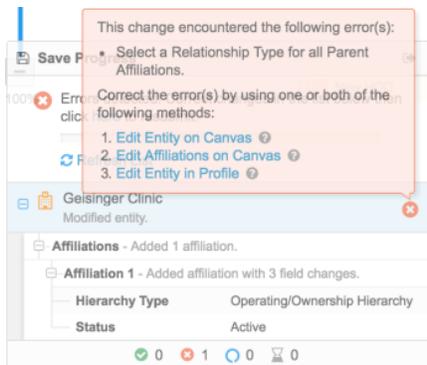
- Approved change - A **Pass** icon (check mark in a green circle) indicates that the DCR is approved.
- Issues found - A **Fail** icon ('x' in a red circle) indicates that data validation failed. The issues must be fixed before the change can be processed.

When changes have been processed, they can be viewed immediately on the canvas by refreshing the hierarchy in view. The canvas re-centers on the root entity, displaying three levels of the hierarchy (parent, root, and child).

Data validation

Depending on the data validation rules enabled in your Network instance, changes might not be processed because of validation issues. If a rule fails when the change is being processed, you can fix the issue immediately and process the change again. Click the **Fail** icon ('x' in a red circle) to see the validation error.

In the example below, a data validation rule failed on the change request because a Relationship Type wasn't specified for the new parent affiliation.



Depending on the failure, data stewards and data managers can fix the issue on the canvas or from a profile. If the issue requires changes to child objects, it must be fixed from the profile because child objects cannot be edited in Network Explorer in this release.

Click the link to the editing method to be immediately directed there to make changes. When the issue is fixed, **Resubmit** the change request from the **Save Progress** dialog.



VIEW MODE

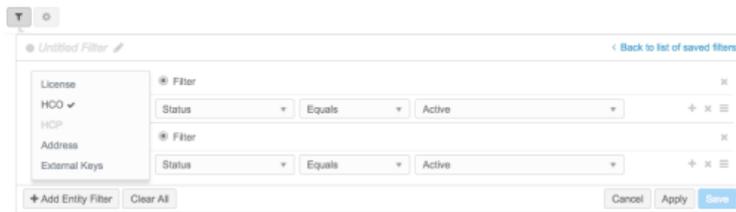
Enhancements to filters and settings are available for all users when they are viewing the canvas.

Filters

Filters can be used so that users can easily find the entities that match their criteria. In this release, enhancements have been made so that users can filter on address, license, and external keys object fields. This enables users to create more complex queries by being able to nest filter statements.

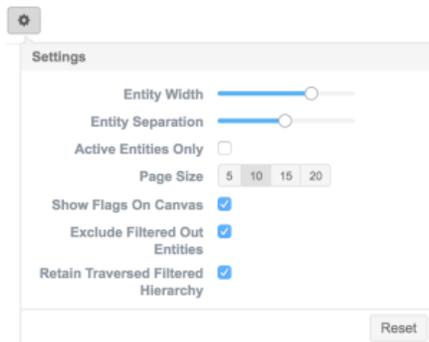
Note: When filters are being used, edit mode is disabled. This ensures that entities are not hidden from data stewards and data managers when they are updating and adding hierarchies.

Click the **Filter** icon and add a new filter to see the new options.



Settings

New options have been added to the Settings dialog to help users navigate the canvas and identify the entities that they are interested in.



The following new options have been added in this release:

- **Show Flags On Canvas** - If enabled, country flags are added to each entity on the canvas.
- **Exclude Filtered Out Entities** - When entities are filtered on the canvas, they are dimmed by default, but still display. Select this option to remove the filtered out entities from the canvas.
- **Retain Traversed Filtered Hierarchy** - This option is selected by default when the **Exclude Filtered Out Entities** option is selected. If a filter is applied on the canvas, after selecting **Exclude Filtered Out Entities**, all hierarchy levels that were initially open will display on the canvas, except the



entities that don't match the applied filter. This is helpful when you're viewing very large hierarchies.

If, after selecting **Exclude Filtered Out Entities, Retain Traversed Filtered Hierarchy** is not selected and a filter is applied, the hierarchy is refreshed and displays only the root entity and its parents and child: three levels of the hierarchy.

- **Active Affiliations Only** - Select to hide all inactive relationships on the canvas.

This option only displays if your instance has been re-indexed. If you do not see this option, contact Veeva Support.

Data model

The following sections describe enhancements to the Network data model for this release.

EXTENDED DATA MODEL

The data model now supports using Veeva OpenData, __v, fields for any country to manage customer or third party master data. Data can be loaded into __v fields without a Veeva OpenData subscription, or in countries where the Veeva OpenData team does not master that field. This enhancement prevents the need to add duplicate fields in your instance. Previously, when you wanted to master your data in Veeva OpenData fields but a field wasn't available in a country, you would duplicate the __v fields using a __c suffix. If you subscribed to Veeva OpenData, or Veeva OpenData started using the field in that country, you would then have duplicate fields in your instance.

Support for using __v fields in the extended data model includes the following considerations:

- Administrators can enable __v fields in any country and load customer-owned data into them when the fields are not used by Veeva OpenData in the country, even with a Veeva OpenData subscription enabled.
- Any changes to the __v fields are routed to the appropriate data stewards, either customer or Veeva OpenData, to maintain.
- If a field in a set is enabled, for example `specialty_1__v`, all fields in the set are enabled (`specialty_1__v` through `specialty_10__v`).
- Ownership of the fields is reflected in the Profile page; __v field labels are colored grey if they are not mastered by Veeva OpenData in a country.

Primary Information	
Name	Lois Sterling
Network Entity ID	242979806533125130
Degree 1	Registered Nurse
Primary Specialty	Unspecified specialty
Other Specialties	No Value
Status	Active
Gender	Female
Major Professional Activity	No Value
AMA Do Not Contact?	No/False
Associated with Kaiser?	No/False
National ID	No Value



- Ownership of the fields is reflected on the Data Model page. There are separate sections to show the countries where the field is managed by a master source and where the fields are managed by customers.



These enhancements to the extended data model are enabled by default.

Note: If you add a new field that is not used by Veeva OpenData in that country, the field is not included in the profile layout for that country. Contact Veeva Professional Services to update the profile to include the field.

Enabling data model fields

Veeva OpenData fields can be enabled to load local or third party master data. A field can be Veeva mastered in some countries, mastered by a third party source in other countries, or be customer-owned in the remaining countries.

To enable Veeva OpenData fields for local or third party master data:

1. In the Admin console, click **Data Model > Network Data Model**.
2. In the Country list, select the country for the field that you want to enable.
3. Select the field. For example, the HCP `credentials_1__v` field.
4. On the Edit Field page, expand the **Countries** section

In the **Managed by Master Data Source** section, the countries where this field is mastered by Veeva OpenData (and the Veeva OpenData subscription is enabled) or a third party source are listed. These rows can only be edited to determine default values or to use Network Expressions. Third party mastered fields are determined by third party systems on the System Interfaces page.

5. In the **Managed by Customer** section, click **Add Country Group**.
6. In the **Countries** list, select the countries that will use this field.

Countries cannot be duplicated for a field. When you add a new country, only countries that are not selected in other rows are available.

7. In the **Network Objects** list, select the entities or child objects that will use the field. Only the entities and child objects that Veeva OpenData uses for this country are available.
8. **Save** your changes.
9. On the Network Data Model page, find the field and click the red **x** icon in the **Enabled?** column. The red **x** icon becomes a green **Check Mark** icon.

The Veeva OpenData field is enabled and can be used to load customer or third party master data. Change requests for that field are automatically routed to the local data stewards, even if the record itself is owned by Veeva OpenData.



Reference data

The following topics describe enhancements to reference data for this version.

REFERENCE DATA INCLUDES STATUS

An updated version of the exported reference data .csv file includes status information. The status information is now independent from country information. This change makes it easier to manage reference codes across different regions.

Previously, if the active countries list was empty for the reference code, the code status was automatically set to *inactive*. To deactivate an active code, in the exported file, all of the countries had to be removed from the **Active Countries** column. To activate the code again, you had to remember the countries that you had previously removed and add them to the **Active Countries** column again.

Now, the exported .csv file contains a new status column called **Active?**. The value in this column sets the status of the reference code.

- To activate a code, in the **Active?** column, type *TRUE*.

If you remove all of the active countries, but the code is set to active, the code won't be usable because there are no active countries listed.

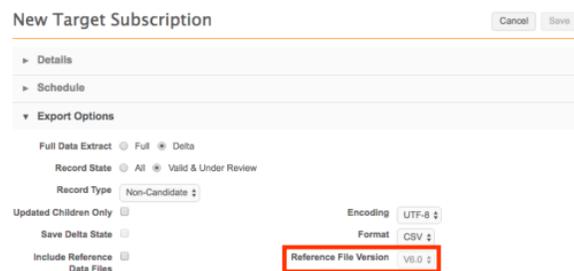
- To deactivate a code, in the **Active?** column, type *FALSE*.

If you set the code to inactive (*FALSE*), the code won't be usable but the active countries can remain in the **Active Countries** column.

A	B	C	D	E	F	G	H
Network Code	Reference Type	Active Countries	Inactive Countries	Definition	Active?	Veeva Maintained?	EN
B	AddressType	AD,AR,AT,AU,BE,BN,CN,MX,TR		A business address to which the pro	TRUE	TRUE	Professional and Preferred Mail
M	AddressType	AD,AT,BE,BY,CH,CZ,AR,AU,BR,CA,CN,JI		A mailing only address where the HI	TRUE	TRUE	Mail Only
P	AddressType	AD,AR,AT,AU,BE,BN		A business address.	TRUE	TRUE	Professional
U	AddressType	AD,AR,AT,AU,BE,BN		An address that cannot be confirme	TRUE	TRUE	Address

Note: Only customer-owned reference codes can be inactivated. Veeva-owned codes can be inactivated for specific countries, but the entire code cannot be inactivated.

The **Reference File Version** in the target subscription settings is updated to **V6.0** and is compatible with previous versions.



For more information about adding and updating reference data, see the *Veeva Network Online Help*.



REFERENCE CODE STATUS UPDATES

The status of reference codes sometimes conflicts between the Network user interface and the exported .csv file. The code itself might be active, but it is inactive in some countries. The user interface is updated to indicate the difference between these status indicators.

On the individual code page, the **Code Active?** and check box was added. If that code is active, the check box is selected.

Reference Type Summary > AddressType > M

▼ M Cancel

▼ Details

Network Code

Code Active?

Definition
A mailing only address where the HCP wants marketing materials mailed. This can be a home address.

Countries Active:

Andorra	Austria	Belgium	Belarus	Switzerland
Czech Republic	Germany	Denmark	Spain	
Finland	France	United Kingdom	Greece	
Hungary	Ireland	Iceland	Italy	Kazakhstan
Liechtenstein	Luxembourg	Monaco	Netherlands	
Norway	Poland	Portugal	Russian Federation	
Sweden	Slovenia	Slovakia	Ukraine	
United States				

Inactive:

Argentina	Australia	Brazil	Canada	China
Japan	Mexico	New Zealand	Turkey	
Other Countries				

On the Reference Code page, the following changes have been made:

- The **Active?** column is renamed to **Code Active?** to indicate the overall status of the code.
- A column called **Active in All Countries?** is added to indicate the status for countries.
 - Black check mark - the code is active in all countries.
 - Gray check mark - the code is active in some countries.
 - Empty - the code is not active in any country

Reference Type Summary > AddressType Type AddressType

Reference Codes – AddressType

Country Export Import

▼ NETWORK CODE	NETWORK NAME	DEFINITION	CODE ACTIVE?	ACTIVE IN ALL COUNTRIES?
▼ B	Professional and Preferred Mail	A business address to which the provider has indicated they want their mail delivered. "B" means both.	✓	✓
▼ M	Mail Only	A mailing only address where the HCP wants marketing materials mailed. This can be a home address.	✓	✓
▼ P	Professional	A business address.	✓	✓
▼ U	Address	An address that cannot be confirmed as any of the other three. "U" means Unknown.	✓	✓

Show 50 of 1 < >



DUPLICATE TRANSLATIONS IN REFERENCE DATA

When administrators are managing reference codes in their instance, Network checks for duplicate values and translations (the same text in the same language for the same code in the same list). Network prevents customer-owned codes from having duplicate translations, but now permits duplicates between customer codes and Veeva OpenData codes.

Permitting duplicate translations between customer-owned codes and Veeva OpenData codes gives administrators more flexibility to manage their reference codes. Customers might have existing translations that duplicate Veeva OpenData's translations, but the duplicates are only being discovered with the recent duplicate checks. Also, customer-owned translations might duplicate translations that Veeva OpenData provides in the future.

The following behavior occurs when duplicate translations are discovered in customer instances:

- Network prevents customer-owned codes from having duplicate translations for the same language. An error occurs to prevent the duplication so that duplicates do not display to users in the user interface.
- Network permits duplicate translations between customer-owned codes and Veeva OpenData codes. Network does a translation check, but if duplicate translations are found, a warning occurs and the duplicate translation is permitted.

Profile

The following sections describe updates to Profiles for this release.

PROFILE MAP

A map has been added to the Profile page to help users visualize where all the addresses associated with an entity are located. The map view will help to make duplicate addresses more prominent to data stewards.

The map feature is enabled by default. To remove the map feature from profiles, administrators can clear the **Map on Profile Page** option in **Settings > General Settings**.

On the Profile page, the map is available in the **Addresses** section. The map displays by default if there is at least one address for that record. All addresses associated to the entity display on the map. To hide the map, click **Hide Map**.



Search (term: novation) > Novation

Novation ☆

125 E John Carpenter Fwy Fl 16 Irving TX 75062 Irving Texas 75062 US

Network Entity ID: 250904765527950336

HCO Type: Organization, Group Purchasing Organization

Phones: 9725815000

Modified Date: 2016-10-06 12:14:06

Source Keys: [master_data_sms](#)

Validate

Primary Information

Addresses Hide Map

Professional 125 E John Carpenter Fwy Fl 16 Irving TX 75062 Irving Texas 75062 US 1

Professional 290 E John Carpenter Fwy Irving Texas 75062-2730 US 1

In the **Addresses** section of the profile, use the **Jump to Map** link to scroll to the map and zoom into the location.

<p>Address Type Professional</p> <p>Address Line 1 *</p> <p>274 S PEARL ST</p> <p>State/Province New York</p> <p>Country United States</p> <p>Address Rank 9</p>	<p>Record State Valid</p> <p>City *</p> <p>ALBANY</p> <p>Zip/Postal Code 12202</p> <p>Status Active</p> <p>Custom Primary Address No/False</p>
---	---

[Verify](#) [Extended Info](#) [Jump to Map](#)

Map pins

The pins on the map are unique to help users to identify specific details about the address. The color of the pin identifies if the address is mastered locally, by Veeva OpenData, or by a third party source. The pins also identify the address status and state and whether it is the primary address. For more information, view the legend by clicking the **Information** icon.

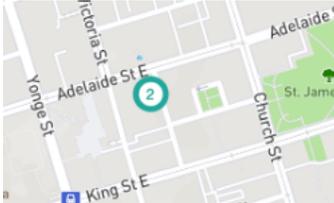
Legend ✕

- Address
- Inactive
- Under Review
- Update
- New
- Veeva Mastered
- Locally Mastered
- Third Party Mastered



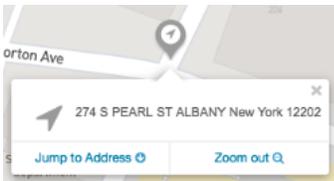
Clusters

When there are multiple addresses at the same location, or the addresses are located near each other, they are grouped together in a cluster. The number on the pin indicates how many addresses are found in that location. The size of the pin increases to show volume helping users to differentiate pin clusters at a glance. Clicking a cluster where the addresses are not at the same location, will zoom in and unravel the cluster.



Business card

Click a pin to view the business card and see address information about that map location. If there are multiple addresses grouped together in a cluster at a location, the business cards are paginated. Click the **Arrow** (< >) icons to page to the next business card.



Use the **Jump to Address** link to scroll to the address information on the Profile page. To zoom the map to the lowest level and view POIs, click the **Zoom In** link. Double click the pin to re-center and zoom into the location. Click the **Zoom Out** link to access the world map.

CUSTOM KEYS FOR CHILD OBJECTS

Custom keys for licenses, parent HCOs and addresses display on the Profile page and are added to all profile layouts (Veeva layouts and custom layouts). The ability to view these keys helps to discover and prevent duplicate custom keys in your Network instance.

To view the custom keys:

1. On the Profile page, go to a child object section, for example, **Addresses**.
2. In the **Custom Keys** heading, click a source system.



Custom Keys	
AXIS, BBM, SAP, VCRM	
AXIS: AXIS ID: 09521512: Active	▼
AXIS: AXIS ID: A521G21: Active	▼
AXIS: HCO: 0124: Active	▼
AXIS: HCO: 0125: Active	▼
AXIS: HCO: 21251: Active	▼
AXIS: HCO: 2142: Active	▼
AXIS: HCO: 321: Active	▼
AXIS: HCO: 9120125: Active	▼
AXIS: Hospital: 2412214: Active	▼
AXIS: Hospital: ASF251: Active	▼

1 of 2 < >

The custom keys for the addresses for that source system display in alphabetical order. For each source, the keys are sorted by status, item, and then value. Inactive and source deactivated keys are dimmed.

REFERENCE FIELD VALUES

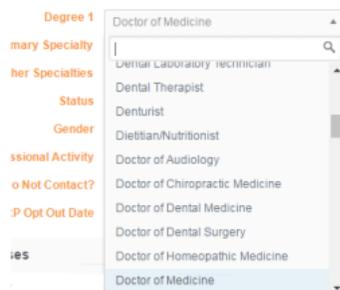
When you edit a reference field on a profile, you will notice a change in the behavior of the value list.

Existing value display

When you edit a reference field that has an existing value, expanding the list displays the current value as the first value in the list.



Previously, expanding the list scrolled to the existing value in the list.





Scrolling the list

Moving the scroll bar the bottom of the list means that you are at the last value of the current retrieved list. You can continue to scroll to see more values.



Previously, moving the scroll bar to the bottom of the list meant that you were at the end of the list.



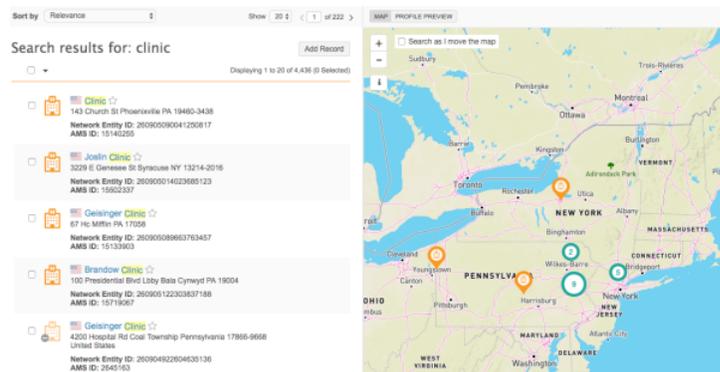
Search

The following sections include improvements to Search for this release.

MAP VIEW

Search results now include a map view to enable Network users to visualize where entity search results are located. Sales and business users can use the map to find and target entities that are in a particular region or in close proximity. The map view will help duplicate entities be more visible to data stewards.

The map feature is enabled by default. To remove the map feature from search results, administrators can clear the **Map on Search Page** option in **Settings > General Settings**.

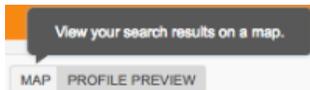




Search results

When you search for an entity, by default, twenty records display on the search results page. Addresses from these results are pinned on the map. If the number of records shown on the results page is updated, the map refreshes to show the updated results. Only search results that contain addresses can be pinned on the map. Hovering over the search result highlights the pin on the map. Clicking a search result opens the entity's business card on the map.

In the Search results, if the map is enabled for your Network instance, the map view can be toggled with the profile view in the right pane. Network preserves your view preference.



Map pins

The pins have characteristics to provide information at a glance.

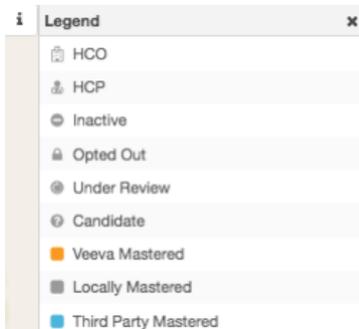
Differentiators

Pins have differentiators to help users identify specific details about the address.

When there is a single entity for a location, the following differentiators are used:

- Entity type - HCP or HCO
- Record owner - color identifies if the address is mastered locally, by Veeva OpenData, or by a third party source
- Record status - active or inactive
- Record state - valid, under review
- Candidate record
- Opted out HCP

For more information, view the legend by clicking the **Information** icon.





Clusters

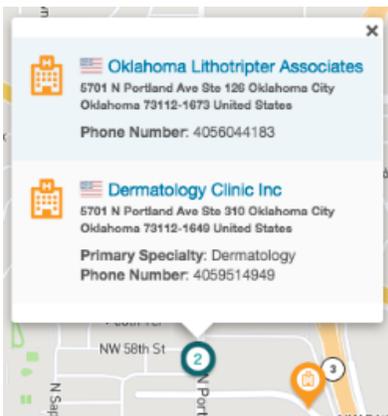
When there are multiple addresses at the same location, or the addresses are located near each other, they are grouped in a cluster. The number on the pin indicates how many addresses are found in that location. The size of the pin increases to show volume, helping users to differentiate pin clusters at a glance. Clusters typically display when you zoom out to see larger areas on the map. Clicking a cluster where the addresses are not at the same location will zoom in and unravel the cluster.



Business card

Click a pin to view the business card containing address, ID, and other attributes from the search results for the entity at that location. The corresponding entity will be highlighted and scrolled to, if it's not in view, in the search results. Click the entity name link to open its profile page.

If there are multiple entities at a location, scroll through the list of business cards for that pin.



Clicking a cluster where the entities are not in the same location will zoom in and unravel the cluster.

Pan and zoom

When users pan or zoom in and out of the map, the search results and pinned locations can update to match the region that is viewed.



To view updated results while panning or zooming in and out of the map, click the **Search as I move the map** option at the top of the map. When users move away from the original view, the search results will update.

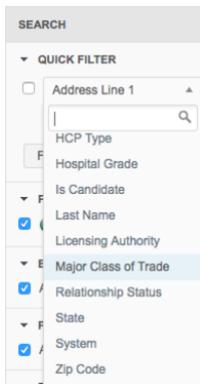
If **Search as I move the map** is not selected, panning away or zooming in or out displays a **Search this area** button to enable you to access search results in the new regions.



SEARCH FILTERS

When you search, the results can now be filtered by the Major Class of Trade reference list.

To filter your search results by Major Class of Trade, in the left panel on the Search results page, click the **Quick Filter** drop down list and choose **Major Class of Trade**. In the drop down list immediately below, select the trade that you want to filter on.



This enhancement is enabled for all countries.



GLOBAL VEEVA OPENDATA SEARCH

Now, when users search Veeva OpenData, they will retrieve results for all countries that they are subscribed to; for example, the United States, European countries, and China. Previously, search for Veeva OpenData records was restricted to one data center, so users had to pick where they wanted to search (for example, only U.S. Veeva OpenData records or only EU Veeva OpenData records). The available data is specific to the user's data visibility profile.

This enhancement is enabled by default.

Data export

TARGET SUBSCRIPTION ENHANCEMENTS

The behavior of target subscriptions has changed. Previously, when a new target subscription was created, all records for a system were included in the export. Now, by default, no records are included for new subscriptions and administrators must use the options on the Target Subscription page to explicitly select the records to export.

The target subscription enhancements are enabled by default.

This change in behavior enables customers to have more control over the data that they export. The previous behavior meant that records were being exported that were not intended to be exported, making it difficult to manage and remove the records in downstream systems.

Note: The data and configuration of existing target subscriptions are not affected by these enhancements.

The Target Subscription page has changed to reflect the enhancements. There is more flexibility for filtering records; records are filtered by entity and custom key. Also, the introduction of groups of filters means that administrators can now define the order of operators (AND, OR) on records. If you want to apply the flexibility of the new filters, they can significantly impact the records that are included in the export.

Example requirement: Export records that had a Veeva CRM custom key and a primary country of Belgium

- **Previous export behavior:** All records with a Veeva CRM custom key (from any country) and any record with a primary country of Belgium (including records with third party custom keys) were exported.
- **New export behavior:** Only records that have a Veeva CRM custom key and whose primary country is Belgium are exported.

Migration considerations

The data and configuration of legacy subscriptions are not affected by the enhancements, but they will look different in the target subscription user interface. The following changes can be observed:



- Existing filters are converted into groups of filters.
- The **Apply as Filter** option for the selected system is converted to a source system filter. For HCP and HCO export options, a new filter group is created with the source system conditions. For custom keys, the source system condition is added to the existing filter group.

The following images show how the target subscription user interface has changed.

Example: An administrator wants to export records that are from the United States and have a `send_to_crm__c` flag as Yes, or records that have a CRM custom key.

The same result is achieved in the previous and new target subscription user interface, but the filter options have changed.

Previous target subscription

The entire subscription is filtered by the system using the **Apply as Filter** check box. The filter sections use AND conditions to specify the records that are exported.

▼ Details

Name

Type

System Apply as Filter

Note Always export entities with VCRM Custom Key

Description

► Schedule

► Export Options

► Entity & Field Selection

▼ Filter Health Care Professionals

FIELD	CONDITION	VALUE		
Defined Query		<input type="text" value="send_to_crm__c:in:Y"/>	AND	✕
Primary Country	Contains	<input type="text" value="United States"/>		✕

Set the search conditions to further restrict the subscription.

▼ Filter Health Care Organizations

FIELD	CONDITION	VALUE		
Defined Query		<input type="text" value="send_to_crm__c:in:Y"/>	AND	✕
Primary Country	Contains	<input type="text" value="United States"/>		✕

Set the search conditions to further restrict the subscription.

▼ Filter Custom Keys

FIELD	CONDITION	VALUE		
Custom Key Status	Contains	<input type="text" value="Active"/>		✕

Set the search conditions to further restrict the subscription.



New target subscription

Groups of filters are introduced so that administrators can use AND and OR conditions to specify the records that are exported. The System field can be used as a filter for either HCP or HCO, or both, but the entire subscription does not have to be filtered by the system.

▼ HCP Export Options

All Records
 Select Records

Records exported will match at least ONE of the following condition groups.

Group 1				
FIELD	CONDITION	VALUE		
Defined Query		send_to_crm_cin:Y	AND	✕
Primary Country	In	United States		✕

+ Add Condition

OR

Group 2				
FIELD	CONDITION	VALUE		
Source System	Contains	VCRM		✕

+ Add Condition

Add New Group

▼ HCO Export Options

All Records
 Select Records

Records exported will match at least ONE of the following condition groups.

Group 1				
FIELD	CONDITION	VALUE		
Defined Query		send_to_crm_cin:Y	AND	✕
Primary Country	In	United States		✕

+ Add Condition

OR

Group 2				
FIELD	CONDITION	VALUE		
Source System	Contains	VCRM		✕

+ Add Condition

Add New Group

▼ Custom Keys Export Options

All Records
 Select Records

Records exported will match at least ONE of the following condition groups.

Group 1				
FIELD	CONDITION	VALUE		
Custom Key Status	Is	Active	AND	✕
Source System	In	VCRM		✕

+ Add Condition

Add New Group



Data exported

Using the options in the target subscription user interface, administrators can filter the data that they want to export. Each export contains the following data.

- Any data defined by the selected filters.
- One level of parent.

For example, if you filter the subscription to export only records for Dialysis Centers, one level of parent for the HCO records is exported. If a Dialysis Center HCO has a parent HCO that is a General Practice HCO, the General Practice HCO parent will be included in the data export.

- Any merge winners.

Merge winners have always been included in exports. So, if you filtered the data to export only HCP prescribers, but a prescriber has been merged with dentist, the dentist will be exported as well.

Adding a target subscription.

The target subscription user interface has changed to reflect the latest enhancements. Review the new steps for creating a subscription.

To create a target subscription:

1. In the Admin console, click **System Interfaces > Target Subscriptions**.
2. In the **Details** section, type a name and description for the subscription and select the **System**. The System is the data source that will be linked to the subscription.
3. In the **Schedule** section, define when you want the data export to run. If you select **Manual**, the subscription only runs when you click **Start Job** on the subscription page.
4. In the **General Export Options** section, define the following options:
 - **Full Data Extract** - Select either *Full* or *Delta*. Delta exports only the data updates since the last run of the subscription.
 - **Record State** - Select to export all records or only records with a state of *All* or *Valid & Under Review*.
 - **Record Type** - Select either *Candidate Records*, *Non Candidate Records*, or *All* record types to export.
 - **Export Only Updated Children** - Choose this option if you only want to export child objects that have been updated.
 - **Save Delta State** - This applies to *Full* data set extracts only. Choose this option if you want the export to save the last delta ID that is exported as the delta state.
 - **Include Source Data view in export files** - Choose if you want to export data lineage information for selected data sources.



▼ General Export Options

TARGETED RECORD OPTIONS

Full Data Extract Full Delta Record Type

Record State All Valid & Under Review

Export Only Updated Children ⓘ

Save Delta State

Include Source Data view in export files ⓘ

HIERARCHY

Level of Hierarchy to Export ⓘ

REFERENCE DATA

Include Reference Data Files Reference File Version

FILE FORMAT

Format Encoding

Timestamp in Filename

5. The **Hierarchy** section indicates that only one level of parent will be exported. Note that the filters that you choose in the subscription ignore parents.
6. In the **Reference Data** section, choose whether you want to include reference data files.
7. In the **File Format** section, select if you want to include a timestamp in the file name.
8. In the **File & Field Selection** section, for each entity, child object or custom key, you can choose the fields to export.

▼ File & Field Selection

HCP	<input type="text" value="Export All Fields"/>	HCO	<input type="text" value="Export All Fields"/>
Address	<input type="text" value="Export Some Fields"/> Select Fields to Export	License	<input type="text" value="Export Some Fields"/> Select Fields to Export
Parent HCO	<input type="text" value="Do Not Export"/>	Custom Key	<input type="text" value="Export All Fields"/>

If you choose **Export Some Fields**, click the **Select Fields to Export** link. All of the fields are chosen, by default. To remove fields, select the field name and click the left arrow icon to move the field to the **Available Fields** column.

9. In the **Export Options** sections for HCP and HCO, define the records that you want to export. If you choose **Select Records**, you can specify records using groups of filters. If you do not define filters, no records will be exported.

Note: These filters do not apply to parents of entities and merge winners. As indicated in the **Hierarchy** section, one level of parent is exported, regardless of the applied filters.



To define a group of conditions:

- a. Click **Add Condition**.
- b. In the **Field** drop down list, select a field. The following fields are available:
 - **Source System** - The system that owns that data. This can be used multiple times in the same group so that you can export the records for more than one system. For example, you might want to export records from Veeva CRM and a system that provides sales data.

Group 1 x			
FIELD	CONDITION	VALUE	
Source System	Contains	Sales Data	AND x
Source System	Contains	CRM	x
+ Add Condition			

- **All Specialties** - Use to define the specific specialties for HCPs or HCOs to export. The set of specialty fields are queried for the value that you define.
 - **Primary Country** - Use to define the primary country of the data.
 - **Type** - Use to specify the type of HCP or HCO records to export. For example, Prescriber (HCP), or Organization (HCO).
 - **Externally Mastered** - Use to export records that are mastered by Veeva OpenData or a third party system.
 - **Defined Query** - Use to filter based on values in, or not in, a particular field. This field can be used multiple times in the same group.
- c. Select the appropriate **Condition** from the list.
 - d. Select or type a **Value**. Depending on the field and condition that you chose, multiple values might be supported.
 - e. To add another condition, click **Add Condition** again, or click Add New Group to create another group of conditions. Multiple groups of conditions are separated by an OR condition.

Example: An administrator wants to export data to their Veeva CRM org that match the following criteria:

Primary Country = *United States* and (**Source System** = *CRM* (CRM custom key exists) or Send to CRM flag = Yes (**Defined Query** = *send_to_crm_flag__c:in:Y*))



HCP Export Options

All Records
 Select Records

Records exported will match at least ONE of the following condition groups.

Group 1

FIELD	CONDITION	VALUE		
Source System	Contains	CRM	AND	✕
Primary Country	In	United States		✕

+ Add Condition

OR

Group 2

FIELD	CONDITION	VALUE		
Defined Query		send_to_crm_flag_cin:Y	AND	✕
Primary Country	In	United States		✕

+ Add Condition

Add New Group

10. In the **Custom Keys Export Options** section, define the records that you want to export. If you choose **Select Records**, you can define specific records using groups of conditions. For example, you can use this to export only the custom keys from your customer system. If you do not define conditions, no records will be exported.

Note: These filters do not apply to parents of entities and merge winners. As indicated in the **Hierarchy** section, one level of parent is exported, regardless of the applied filters, so the parents' entity keys are not affected.

To define a group of conditions:

- Click **Add Condition**.
 - In the **Field** drop down list, select a field:
 - Source System** - The system that provides the custom key data. The available values are based on the systems defined in your Network instance.
 - Custom Key Sources** - The custom key source that the system provides. Users can include anything in this field.
 - Custom Key Status** - The status of the custom key; for example, Active.
 - Select the appropriate **Condition** from the list.
 - Select or type a **Value**. Multiple values are supported for the Source System and Custom Key Sources fields.
 - To add another condition, click **Add Condition** again. Note that the available fields can only be used once in each group.
 - To create another Group, click **Add New Group**.
11. **Save** your subscription.

When the subscription runs, the data that you chose will be exported in a .csv file.



FILTER PARENT HCOs

Target subscriptions now include an option to apply the group conditions that you defined so that parent HCOs are filtered out of your export.

During export, one level of parent HCOs are included to ensure that relationships are intact. The parent HCO is exported, even if it does not meet the criteria of the filter that you define. This leads to unwanted records in your downstream system. For example, if you want to only export HCPs that are prescribers and HCOs that are Dialysis Centers, if a prescriber has an HCO parent that is a General Hospital, the General Hospital will be included in the export. This enhancement ensures that the HCO parent is not included in your export.

This option is available in all new subscriptions, but it is not selected by default. Existing subscriptions are not affected by this enhancement; the option is available, but is not selected.



To filter out HCO parents from your export, in the Hierarchy section of your target subscription, click **Apply Group Conditions to Parent HCOs**.

Stale data

Filtering out parent HCOs from your subscription might cause stale data in your downstream system. For example, in an earlier export, a parent HCO that is a Dialysis Center is exported. If the parent HCO is changed to a General Hospital and the **Apply Group Conditions to Parent HCOs** is selected, the record in your downstream system will not be updated to a General Hospital and the parent/child relationship will not be updated.

Using one of the following options can prevent stale data in your downstream stream:

- Set a flag (for example, **Send to CRM**) so that the parent HCO records with a send to CRM flag are exported.
- Create a source system filter (where the source is your downstream system) so that any records tagged with a custom key are exported.

FTP PATH

The FTP path for the exported file is now configurable. In this release, new permissions have been introduced to give administrators the flexibility to provide users with selective access to Network APIs and FTP locations. To support this enhancement, the FTP path can be defined for each target subscription. Specifying the path ensures that only users with permission to that FTP location can access the exported file.

The file path is relative to the FTP directory for the instance. For all existing subscription, the standard path displays.



FILE FORMAT

Format CSV Encoding UTF-8

Timestamp in Filename

FTP Path Default Custom

eg. /third_party/outbound

For more information about the assigning users access to specific FTP locations, see the topic called *Integration User*.

Change requests

The following sections describe updates to change requests for this release.

DCR QUEUE

Change requests can now be submitted for an unverified record and are routed to the local or master data steward to process. The change requests are organized in the Inbox and on the Change Request page so they can be processed in order.

The DCR queue enables sales reps to create records in Veeva CRM and then immediately make changes to the record. Previously, until an unverified record was processed by a data steward, subsequent changes to the record were auto-rejected. Additionally, because all of the associated requests are organized in the Change Request page, data stewards can see other potential changes for the record and resolve them during one call verification.

The DCR Queue feature is enabled by default.

Note: DCR queue is only available if administrators have enabled the Create Unverified option in the Workflow Settings page.

Task status

There are two distinct statuses designated to new requests to define the order in which they should be processed:

- **Pending Review:** Assigned to the initial add or change request submitted on a valid record.

There could be multiple pending review tasks for a record because the change requests might be independent from each other; for example, address and license changes for a valid HCP record.

- **In Queue:** Tasks that are related changes made on an unverified record. These tasks cannot be processed until the *Pending Review* request is completed.

Task behavior

Review the following key points to understand task behavior:

- *Pending Review* tasks must be processed before *In Queue* tasks.



- If the *Pending Review* add request task is rejected, Network auto-rejects all of the dependent *In Queue* tasks.
- If the *Pending Review* task is reassigned to another data steward, all associated *In Queue* tasks are reassigned to the same steward. *Pending Review* tasks for the same record are not reassigned because they can be completed independently.
- If your Network customer instance has enabled auto-approve on change requests, Network processes the requests in chronological order (the Network creation date).
- All tasks that are In Queue are given a Parent Task ID. This task ID refers to the add request task. It is possible for a task to have multiple task IDs if it is a change request on multiple *Under Review* tasks.
- Veeva CRM - Change requests sent to Network are processed in chronological order - from oldest to newest creation in terms of Network Created Date. This includes the following situations:
 - Scheduled jobs in Veeva CRM that are sent in specific intervals (for example, an HCP updates his own profile).
 - Change requests submitted offline mode (for example, sales representatives submit a DCR from iRep).

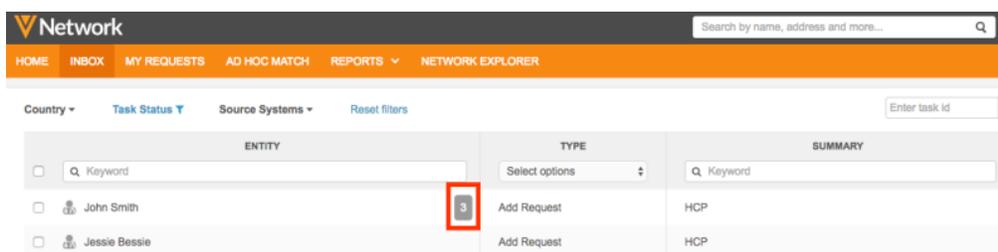
Note: Note that the *In Queue* status is not exposed in Veeva CRM.

- Network API - canceling an *In Queue* task through the API cancels all subsequent tasks.

Note: Note that the *In Queue* status is not exposed in the API for version 9 and earlier. The status of the DCR task will be *Pending Review*).

Inbox changes

In the Inbox, only the task that is in *Pending Review* state displays. Any *In Queue* tasks are hidden so that they cannot be processed until the initial request is complete. A number beside the change request indicates the number of associated (*In Queue*) requests for that record.



Stewarding tasks

When a data steward opens an add or change request, any associated tasks are auto-assigned to the same data steward. The associated tasks are listed on the Change Request page so that the data steward is aware of other potential changes for the record.



Inbox > Add Request-John Crosby

Add Request

All Fields DCR Fields

First Name *	John
Last Name *	Crosby
HCP Type	Prescriber
Status	Active
Gender	Male
AMA Do Not Contact?	No/False
PDRP Opt Out?	No/False
Associated with Kaiser?	No/False
Fellow	No/False
Grad Training?	No/False
Primary Country	United States

Re-assign Reject Match Save Apply

Approved? ▾

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[View 2 associated requests on this page](#)

REQUEST SUMMARY

Task ID
928939144686403615

Customer's Task ID
928939143980318751

Subject
New Record Request

Creator
rep2@veeva.veevanetwork.com

Source
Entity Profile Editor

Date Created
2016-09-08 12:35:09

Requester Comments
New record added via Network portal.

Assignee
steward@veevanetwork.com

Status
 Pending Review

System
instance_10002

COMMENTS (0)

Associated Requests For John Crosby

DCR ID	SUMMARY	STATUS	CREATOR	DATE CREATED	ASSIGNEE
928939147372462111	HCP Add Specialty 2 "Cardiothoracic Radiology" Add Major Professional Activity "Medical Teaching" Add Specialty 1 "Acute Care Pediatrics (APNs only)"	In Queue	rep2@veeva.veevanetwork.com	2016-09-08 12:35:50	steward@veevanetwork.com
928969864253603871	ADDRESS Add State/Province "Pennsylvania" Add Status "Active" Add Zip/Postal Code "25129" Add Address Type "Professional"	In Queue	rep2@veeva.veevanetwork.com	2016-09-13 22:47:32	steward@veevanetwork.com

To see the associated tasks, stewards can click the **View associated requests on this page** link in the top of the right pane, or scroll to the bottom of the change request view. The **Associated Requests** section lists any *In Queue* tasks.

Data stewards can click the **DCR ID** link to view an *In Queue* task or a *Pending Review* task. If data stewards view an *In Queue* task in the **Change Request** view, a **Warning** icon displays beside the heading to indicate that the task cannot be processed until the *Pending Review* task is complete. In the **Associated Requests** section, the *Pending Review* task displays with a **Green** icon in the **Status** column to indicate that the task must be processed first.



Requests in queue cannot be processed before pending review requests.

Change Request

All Fields | DCR Fields

	Current Value	Change Request	
> LICENSE (NEW)			✓ ✕ ✎
Licensing Authority	No Value	CA-CHCC	✓ ✕ ✎
License	No Value	HCA-203481320	✓ ✕ ✎
License Degree	No Value	No Value	
License Type	No Value	Country	✓ ✕ ✎
License SubType	No Value	Limited	✓ ✕ ✎
License Eligibility	No Value	Eligible	✓ ✕ ✎
Sample Eligibility	No Value	Eligible	✓ ✕ ✎
DEA Activity Code	No Value	Distributor, General	✓ ✕ ✎
Address	No Value	No Value	✓ ✕ ✎
License Status	No Value	Active	✓ ✕ ✎
License Status Condition	No Value	No Known Conditions	✓ ✕ ✎
Effective Date	No Value	2016-02-07	✓ ✕ ✎
Expiration Date	No Value	2019-02-07	✓ ✕ ✎

Associated Requests

DCR ID	SUMMARY	STATUS	CREATOR	DATE CREATED
928821552170336287	▼ HCP Add Associated with Kaiser? "No/False" Add HCP Type "Prescriber"	Pending Review	vnetadmin@uscustomer.veevanetwork.com	2016-08-18 18:09:49

In the **Associated Requests** section, data stewards can add comments to an *In Queue* task by clicking the **Comment** icon. This is helpful during call verification for the *Pending Review* task because the data steward can add comments to the associated tasks if they were able to verify information during the same call.

Find Suspect Match

Find suspect match is not supported with *Under Review* records. Performing a Find Suspect Match action on an *Under Review* record can lead to duplicate records in your Network instance. The record must be processed before a Find Suspect Match action can be performed.

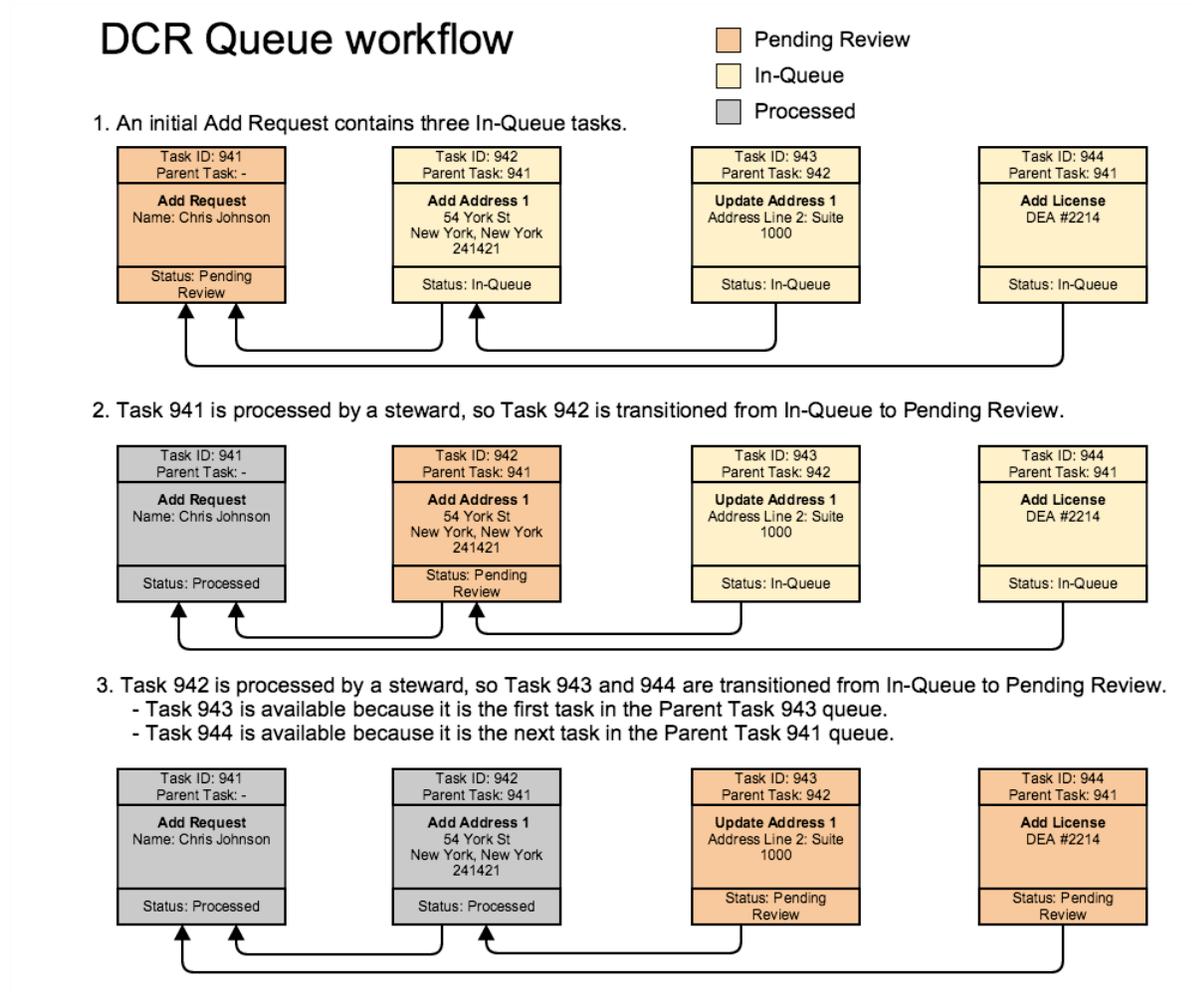
Task workflow

Requests that are *Pending Review* must be processed before *In Queue* requests. This ensures that add requests are processed before change requests, and prevents newer changes from being overwritten. When a *Pending Review* task is processed, the status of the next *In Queue* task (in chronological order by submit date and time) becomes *Pending Review* and then can be processed. Data stewards can click the



Go to Next Task link to open the next task in the Associated Requests list. This enables the data steward to complete all of the tasks for that record.

Review this example to understand how *Pending Review* and *In Queue* requests are processed. Arrows from a task point to the corresponding parent task.



Reporting considerations

All *Pending Review* and *In Queue* tasks are included in reports so that you have an accurate view of the data.

Third party master considerations

The change request enhancements do not affect third party master data. Change requests on unverified records that are third party mastered are still auto-rejected by Network. Also, the *In Queue* task status is not exposed to downstream systems through API retrieves or DCR exports. This ensures that any downstream systems are not impacted by the internal Network task status.



DCR ENHANCEMENTS

The following enhancements have been made to data change requests.

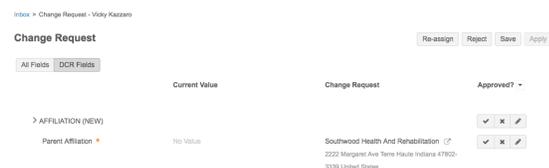
Copy

Users can now highlight and copy values from the Change Request page.

PARENT HCO UPDATES

Primary address

The primary address of the parent HCO now displays in the **Parent Affiliations** section on a DCR. Parent affiliations often have similar names making them difficult to distinguish on the DCR page. Viewing the address helps data stewards to accept or reject changes for the parent affiliation. The address cannot be edited.



Link to HCO

An icon displays beside the Parent HCO address so that a data steward can go directly to the HCO's profile. When the icon is clicked, the HCO profile opens in a new tab.

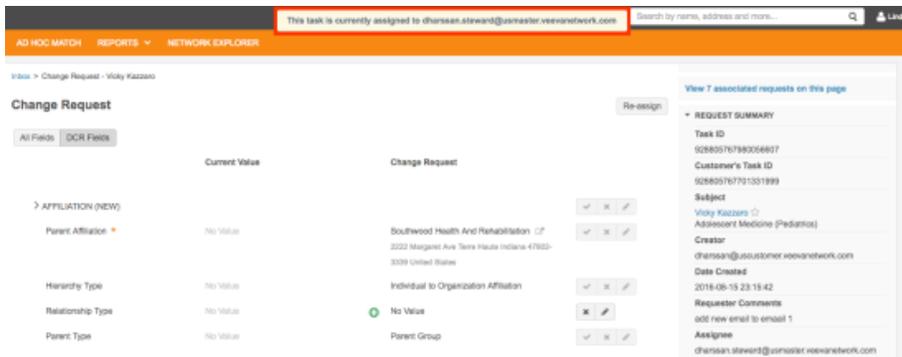
The icon is active on tasks for the following situations:

- Change requests that contain new parent HCOs
- Change requests that contain changes to existing HCOs
- New add requests containing a parent HCO.

STEWARDED TASKS

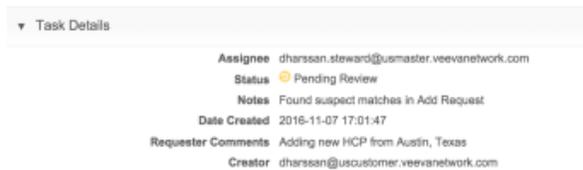
Notification

When a data steward clicks on a task, a message displays if the DCR is assigned to another user. The message displays on DCR tasks and suspect match tasks. Displaying the message alerts data stewards that the task is assigned so the data steward won't unknowingly reassign the task to themselves. This is particularly helpful for preventing multiple phone verifications to the same HCP or HCO, which can be disruptive.



SUSPECT MATCH

Suspect matches that are created through an Add Request now include **Creator** and **Requester Comments** information in the Task Details section. This information gives data stewards more information to help them determine the outcome of the match. For example, a data steward can see that a sales rep created the suspect match and the rep added more information in the comments.



Custom keys

RECORDS WITH DUPLICATE CUSTOM KEYS REJECTED

Custom keys are cross-references between an identifier from an external system and a Network ID. All custom keys should be unique throughout your Network instance. A custom key is defined by *source*, *item*, and *value* identifiers in a model map, and has an active status; for example: `SAP : SAP ID : 242`. Records that contain duplicate custom keys cannot be updated by users. Network has duplicate key prevention, but previously it did not handle situations where duplicates were loaded through the same source subscription job. Now, when a source subscription loads, records that contain duplicate custom keys will be rejected. This enhancement will help to preserve data quality and to ensure that records can be updated.

This feature is not enabled by default.

Note: This feature is not immediately available for general release in Network 10.0.0.1, but will be soon after. Contact Veeva Support if you want to enable this feature immediately.
To discover if your Network instance contains duplicate custom keys and request their removal, contact Veeva Support.

During data load, one record is accepted, but any other records with the same custom key are rejected. This applies to duplicate custom keys on entities and child objects. The entire record is rejected if a child object has a duplicate custom key.



Example 1

A data load includes a record that has duplicate custom keys for the HCP and an address.

HCP

ID	First Name	Last Name	Specialty
51292	Richard	Bryant	Cardiology

Address

ID	entiy_vid__v	Address Line 1	City	Country
21482	51292	502 Port St	New York	United States

Custom Key

ID	entity_vid__v	entity_type	Source	Item	Value	Custom Key
92581	52192	HCP	SAP	SAP ID	2421	SAP:SAP ID:2421
77824	21482	Address	SAP	SAP ID	2421	SAP:SAP ID:2421

Result: The entire record will be rejected during the source load because the HCP and address have the same custom key.

Tip: To create unique custom keys, use the entity type as the **Item** value to prevent duplicates. In this example, if the entity type is used, there would be two unique custom keys: `SAP:HCP:2421` and `SAP:Address:2421`.

Example 2

A data load includes a two HCPs that have the same address (duplicate custom keys).

HCP

ID	First Name	Last Name	Specialty	Source	Item	Value	Custom Key
51292	Richard	Bryant	Cardiology	SAP	HCP	9521	SAP:HCP:9521
75211	John	Smith	Oncology	SAP	HCP	4981	SAP:HCP:4981



Address

ID	entity_vid__v	Address Line 1	City	Country	Source	Item	Value	Custom Key
14076	51292	421 Long St	New York	United States	SAP	Address	90281	SAP:Address:90281
51659	75211	421 Long St	New York	United States	SAP	Address	90281	SAP:Address:90281

Result: One of the records will be accepted, subsequent records will not be imported and an error will occur. In this example, Richard Bryant is loaded into Network and John Smith is rejected.

Tip: To create unique custom keys, append the **Value** from the HCP's custom key to the front of the **Value** for the address's custom key. In this example, the two unique custom keys would be `SAP:ADDRESS:9521-90281` and `SAP:ADDRESS:4981-90281`.

For more examples, see the *Veeva Network Online Help*.

Error logs

Errors occur for records that were not loaded because of duplicate custom keys.

To view the records that were not loaded, on the Job Details page, view the **Job Error Log** section. Each error is cataloged here so that you can review the error and update the affected custom keys so that they are not longer duplicates.

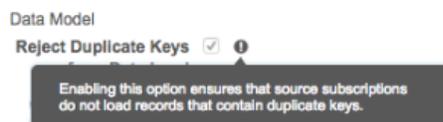
Updating existing records that have duplicate custom keys

Records in your Network instance that have a duplicate custom key cannot be updated by matching on the custom key using source subscriptions. Previously, Network would update the first record it sees if the same custom key is associated to multiple records. Now, during data load, if Network detects that there are updates for a key that is associated to multiple records, then no update will be loaded and an error occurs. This change in behavior ensures that data quality is preserved; records are not updated unless Network can determine exactly which record, containing the custom key, the update is intended for.

Enabling this feature

This feature is not immediately available for general release with Network 10.0.0.1. To request it immediately for your Network instance, contact Veeva Support.

When the feature is available for your Network instance, administrators can enable it by selecting the **Reject Duplicate Keys** option in the General Settings.





Match

The following sections describe updates to match features for this release.

MATCH ANALYSIS LOG

Improvements have been made to the match analysis log that you can export from within a source subscription.

Indicate selected fields to display in the log

An advanced setting called `job.match.additionalColumns` can be used to provide a list of additional columns for HCP and HCO fields and child fields in the log. To show fields, list the fields separated by commas (,). The name of the field and child field must be used exactly as it is used in the data model and the names are case-sensitive. By default, the log shows both match and source values for all fields included in the match rules for that subscription. Use this setting to add more values to that log.

Each column name should be in the following format:

```
(Match or Source):fieldName.childFieldName
```

Note: If the column name is not in the correct format, the column will not be added.

Examples:

- `fieldName = addresses__v`
- `childFieldName = thoroughfare__v`
- `childFieldName = locality__v`

To show the match value for the `thoroughfare__v` child object field:

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

To show both the source and match values for the `thoroughfare__v` and `locality__v` fields:

```
"job.match.additionalColumns":
"Match:addresses__v.thoroughfare__v,Match:addresses__v.locality__v,
Source:addresses__v.thoroughfare__v,Source:addresses__v.locality__v"
```

Any field from an HCP, HCO, or child object can be included in the match log but only attributes from records in the instance are shown. Additional columns might display for fields used in the match rules for "other countries" (ZZ).

Rule Name	Features	Advice	Mode	Source Archi	Source Type	Source Id	Source Count	Match Id	Numeric Match Vid	Instance	Match Count	Source me_i	Match addresses__v.vid__v
ME is identic	ME is identic	ACT	Master Link	00000132:0C	NA	NA	US	v.864545774	8.64546E+17	3 US	354564012	887886334755079169 ~ 887886335115789315 ~ 887886335073846275	



To add this property to the source subscription, click **Advanced Mode** and include it in the **Edit Module Properties** dialog.

Data group information

The match log analysis file now includes information about the data groups that contain the matching records and which data group produced the winning match. For any records with ACT or ASK outcomes, the following information is included in the match analysis file:

- (X) – shows the data groups that each record was placed in.
- (-) – shows the data groups that each record was not placed in.
- (M) – shows the data groups that produced the match.

customer-HCP-MATCH+DATA-GROUP-ANALYSIS-2016-07-11T13-47-0700-job-732 (1)									
Search Sheet									
S	T	U	V	AJ	AK	AL	AM	AN	AO
Source first_name__v	Match first_name__v	Source last_name__v	Match last_name__v	Data Group: addresses__v.locality__v, addresses__v.thoroughfare__v, first_name__v, primary_country__v	Data Group: first_name__v, primary_country__v	Data Group: first_name__v, last_name__v, primary_country__v	Data Group: addresses__v.locality__v, addresses__v.thoroughfare__v, primary_country__v	Data Group: last_name__v, primary_country__v	Data Group: addresses__v.locality__v, addresses__v.thoroughfare__v, last_name__v, primary_country__v
ALBERT	ALBERT	EINSTEIN	EINSTEIN	-	M	M	-	M	-
ALBERT	ALBERT	EINSTEIN	EINSTEIN	-	-	M	X	-	X
ALBERT	ALBERT	XXXXXXXXXEINSTEIN	EINSTEIN	-	M	X	-	X	-
XXXXXXXXXALBERT		XXXXXXXXXEINSTEIN							

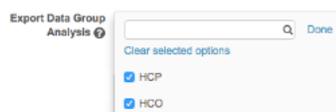
Note: If you have "key matching" turned on in a source subscription, and the incoming file matches solely on keys, the new data group columns do not display in the log. When a record matches on an external key, it doesn't go through the rest of the matching process; no data groups are created and the regular rules are not run.

For more information about data groups and examples of fields with null values, see the *Veeva Network Online Help*.

DATA GROUP ANALYSIS SELECTION

When you choose to export the data group analysis in a source subscription, you can now select the entities to log. Previously two files were always created. Users can now choose to export just one.

You can select **HCP**, **HCO**, or both entities.



MATCH RULES SUBSTRING OPTIONS

Using basic and advanced match rules, administrators can identify a substring starting within a string of text, or extract a substring from the end of a string of text. Previously, substrings could only be used in matching from the beginning of a string. Now, the substring algorithm supports using an offset with a negative (-) number which starts the match at the end or middle of the string, depending on the length specified.



This is particularly useful for matching on HCP names. Often, middle names are only an initial, and in some countries multiple last names are common. Using substrings enables you to match on specific parts of a name to ensure that matches are found.

For example, an offset of -1 starts at the last character of the string. An offset of -4 will start at the fourth last character of the string. The length considers the number of characters from that point backwards in the string.

```
<substringComparison>
  <offset>-1</offset>
  <length>4</length>
</substringComparison>
```

Examples:

- XXXjohn and YYjohn would be equal using the substring comparison with offset = -1 and length = 4
- XXXjohnX and YYjohnY would be equal with offset = -2 and length = 4.

Update the substringComparison command

The `substringComparison` command can be configured for any subscription.

1. In the Admin console, click **System Interfaces > Match Default Configuration**.

or

Update a source subscription directly, by clicking **System Interfaces > Source Subscriptions**. Select a subscription and expand the **Match Configuration** section.

2. Select a **Country** from the drop down list.
3. Click **Advanced Mode**.
4. In the **HCP Match Rules** or **HCO Match Rules** section, add or update the `substringComparison` command with your specific offset and length requirements.

Example:

```
<substringComparison>
  <offset>-1</offset>
  <length>4</length>
</substringComparison>
```



```
HCP Match Rules Default ⓘ Override ⓘ  
</jaroWinklerComparison>  
</direct>  
<direct>  
<field>middle_name_v</field>  
<nullMatching>IGNORE</nullMatching>  
<multiComparison>  
<agreement>ONE</agreement>  
<substringComparison>  
<offset>0</offset>  
<length>1</length>  
</substringComparison>  
</multiComparison>  
</jaroWinklerComparison>  
<usingWinklerExtension>true</usingWinklerExtension>  
<usingLargeStringTolerance>false</usingLargeStringTolerance>  
<threshold>0.83</threshold>  
</jaroWinklerComparison>  
</multiComparison>  
</direct>  
</collate>  
</feature>  
<feature>  
<name>names are identical</name>  
<enabled>true</enabled>  
<comments></comments>  
</collate>  
<direct>  
<field>first_name_v</field>  
<field>last_name_v</field>  
<nullMatching>STRICT</nullMatching>  
<jaroWinklerComparison>  
<usingWinklerExtension>true</usingWinklerExtension>  
<usingLargeStringTolerance>false</usingLargeStringTolerance>
```

Using the substring comparison in the UI

The substring algorithm can now be configured for any subscription using the Match Rules UI.

1. In the Admin console, click **System Interfaces > Match Default Configuration**.

or

Update a source subscription directly, by clicking **System Interfaces > Source Subscriptions**.
Select a subscription and expand the **Match Configuration** section.

2. Select a **Country** from the drop down list.
3. Click the **Match Rules** tab.
4. In the HCP Features section, click **Add Feature**.
5. Type a name for the feature.
6. In the **Fields** list, select the field that this feature applies to.
7. In the Algorithm list, select **Substring**.
8. In the **Starting character** field, type the offset value. Note that the first character in a word is 0.
The last character is -1.
9. In the **Length** field, type the number of characters from the offset point backwards in the string
10. To save your changes, click **Done**.

Ad hoc match

LOG UPDATES

The ad hoc match log file contains two additional columns to show the match feature set and features that matched. Data managers can use this information to tune and adjust the match rules.



New columns:

- **Rule Name** - identifies the match rule that resulted in the potential match.
- **Features** - identifies the features that matched.

HCP-0000115												
A	B	C	D	E	F	G	H	I	J	K	L	M
1	first_name_v	last_name_v	address_line_1_v	locality_v	administrative_area_v	Match Status	Rule Name	Features	vid_v	primary_country_v	hcp_type_v	arr
2	James	Behm	1101 Pugh Rd	Radnor	Pennsylvania	Match Found	Names are exactly identical, specialities overlap	First and Last names are identical, Specialities overlap	9.28979E+17	US	P	N
3												

Data load

The following topics describe updates to source subscriptions for this release.

CALCULATING SURVIVORSHIP WITH LAST UPDATED TIME

You can now use the last updated time on incoming records when calculating survivorship. If there are two or more records from the same incoming source that match, then in the event of a disagreement, only the values on the most recently updated record will survive.

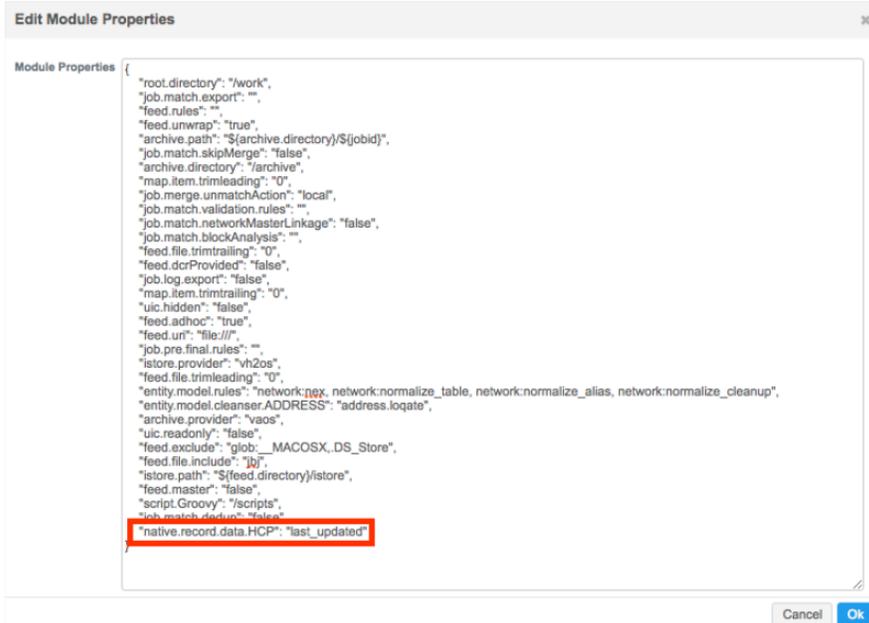
To enable this function, add an advanced property to the source subscription to identify the column name that contains the last updated time.

To define which column in an incoming .csv file contains the last update time:

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

```
"native.record.data.[entity type]": "[attribute name]"
```

For example, in a typical source subscription the property would be:
 "native.record.data.HCP": "last_updated" where *last_updated* is the name of a column in the incoming .csv file.

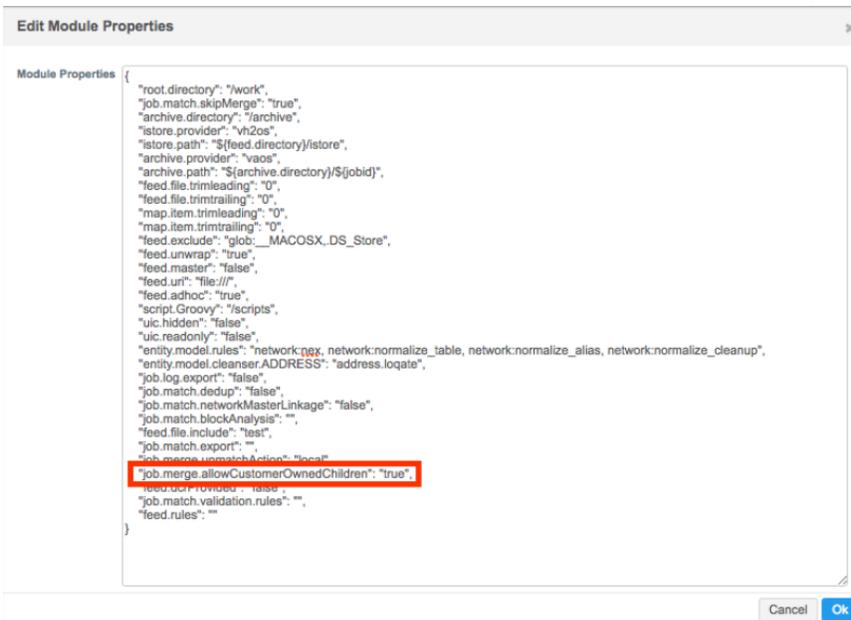


As with all date and time fields, the values in the source .csv file must follow the ISO 8601 standard.

ADVANCED PROPERTY CHANGES

The "job.merge.allowCustomerOwnedChildren" property enables you to add customer-owned children to Veeva OpenData records. The default value is now "true"; however, any existing subscriptions that have this property set to "false" will not be changed.

This property is included in the default module properties for any new subscriptions added using the Network instance user interface.





MATCH RESULT TYPE

Source subscription settings now provide the option to filter exported match log by result type: ACT, ASK, or no matches. Choosing the match records to see in the log enables customers to focus on the match results that they care about, and reduces the size of the file.

The match options are available in the **Settings** section of the source subscription. All three options are enabled by default. Existing subscriptions will retain their original settings.

Source Subscriptions > New Source Subscription

New Source Subscription

Advanced Mode Cancel Save

Details

Name: My_subscription System: change_request

Description:

Settings

Allow File Reprocessing Apply Updates & Merge

Job Error Log Match Against OpenData

Source Dedupe

Action for Unmatched & Suspect Match: Create Valid Records Export Data Group Analysis: Select options

Export Match Analysis: Select options

Result Type: ACT results ASK results Unmatched results

FTP PATH

The FTP path is now configurable. In this release, new permissions have been introduced to give administrators the flexibility to provide users with selective access to Network APIs and FTP locations. To support this enhancement, the FTP path can be defined for each source subscription. Specifying the path ensures that only users with permission to that FTP location can access the files.

The file path is relative to the FTP directory for the instance. For all existing subscription, the standard path displays.

Source Files

FTP Path: eg. inbounddata_source_name

For more information about the assigning users access to specific FTP locations, see the topic called *Integration User*.

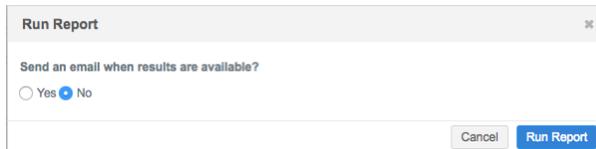


Reports

The following sections describe updates to reports for this release.

EMAIL OPTION

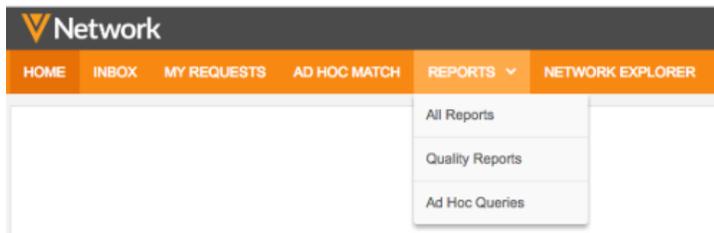
When users manually run a report, a new dialog displays so that they can choose to be emailed the results.



A dialog box titled "Run Report" with a close button (X) in the top right corner. Below the title bar, the text "Send an email when results are available?" is displayed. Underneath, there are two radio buttons: "Yes" and "No". The "No" radio button is selected, indicated by a blue dot. At the bottom of the dialog, there are two buttons: "Cancel" and "Run Report".

NAVIGATION

The Reports navigation is updated. To access Quality Reports and Ad Hoc Queries, on the Network menu bar, click **Reports**. Select the option from the list. The navigation menu on the left panel is no longer available.



VIEW JOB DETAILS IN A REPORT

Reports are now available for source subscription and target subscription job details. Administrators and data managers can run the reports to see the status of all of the jobs run in the Network instance.

The job summary report includes information such as:

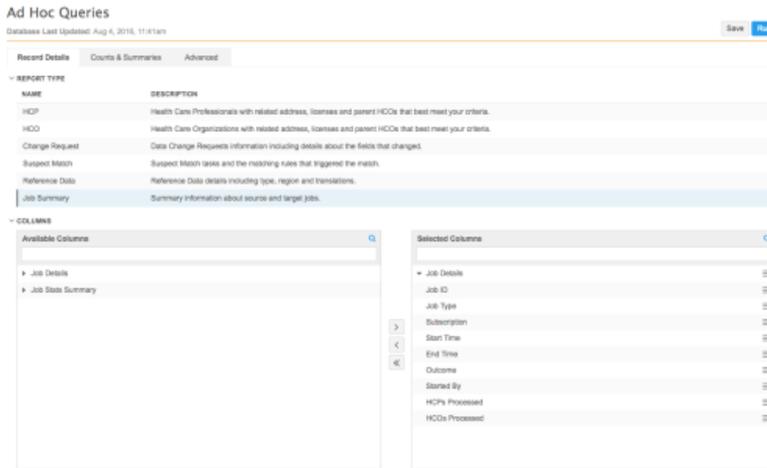
- Source system and subscription
- Start and end times
- Outcome
- User (if the job was manually-triggered)
- FTP path
- Number of records loaded or exported

To run a job summary report:

1. Click **Reports > Ad Hoc Queries**.
2. On the **Record Details** tab, in the Report Type section, select the **Job Summary**.



The **Columns** section is predefined with the columns for the job summary report.



3. To add columns from the **Available Columns** pane to the **Selected Columns** pane, click on the field name and click the right arrow (>) icon.
4. To remove default columns in the **Selected Columns** section, click on the field name and click the left arrow (<) icon.
5. Add filters or sort criteria, as required.
6. To run the report, click **Run**.

The **Results** section displays the results of the query. Note that the information in job reports might be up to five minutes out-of-date.

Results (165 records)									
JOB ID	JOB TYPE	SUBSCRIPTION	START TIME	END TIME	OUTCOME	STARTED BY	HCPS PROCESSED	HCOs PROCESSED	
2	source	dfb_import__v	2016-08-15 16:03:48	2016-08-15 16:04:02	COMPLETE	System	1	20	
4	source	dfb_import__v	2016-08-15 16:28:28	2016-08-15 16:28:41	COMPLETE	System	0	21	
5	source	dfb_import__v	2016-08-15 16:28:33	2016-08-15 16:28:35	COMPLETE	System	0	21	
10	target	redshiftExporter	2016-08-16 17:08:00	2016-08-16 17:08:07	COMPLETE	System	14968	14913	
16	source	change_request__v	2016-08-17 12:32:40	2016-08-17 12:32:48	COMPLETE	steward2@verao.veevanetwork.com	1	0	

In the results, click the **Job ID** link to go to the Job Details page.

7. To download the report as a .csv file, click the **Download** icon.

JOB STATISTICS

The source and target subscription job statistics that are available in the Job Details page are now available in Network reports. Administrators and data managers can run reports about job statistics, including match rate, number of records loaded, and number of bad records. Use these reports to identify trends and proactively identify issues with data importing and exporting.

Data managers and administrators can receive emails that include the report results so that issues can be resolved more quickly and with less manual monitoring of jobs. Emails are only sent if the report returns results.



Report templates

Network includes several predefined query templates to help you get started with job statistics reporting.

Failed Record Count

This report identifies the long term trend in the number of records that failed to load for a subscription.

When you load the template, the subscription name parameter must be defined in the query:

```
job.subscription ilike '%INSERT SUBSCRIPTION NAME HERE%'.
```

JOB ID	JOB TYPE	SUBSCRIPTION	START TIME	HCPS PROCESSED	HCOS PROCESSED	JOB.OPENED.ISSUES	HCP.SKIPPED	HCO.SKIPPED	ADDRESS.SKIPPED	LICENSE.SKIPPED
559	source	CRM	2016-10-30 15:15:00	433	44	1	0	0	0	0
535	source	CRM	2016-10-27 15:15:00	442	39	1	9	2	3	0
610	source	CRM	2016-11-02 15:15:00	388	36	1	23	3	6	0

Job Duration

Identifies the long term trend in job duration for a subscription. Spikes in duration time can point to potential performance issues. An abnormal duration time might be caused by a problem with a data.

When you load the template, the subscription name parameter must be defined in the query: AND

```
subscription LIKE '%INSERT SUBSCRIPTION NAME HERE%'
```

JOB ID	DURATION(S)	START TIME	SUBSCRIPTION	JOB TYPE	HCPS PROCESSED	HCOS PROCESSED
1010	12	2016-11-24 14:15:00	CRM	source	433	44
1002	97	2016-11-23 14:15:00	CRM	source	442	39
943	14	2016-11-22 14:15:00	CRM	source	388	36

Jobs with Issues

Identifies bad jobs that ran in the last 24 hours. Receiving an email about these report results enables you to immediately take action. Often, job errors can go unnoticed until downstream systems realize that there are issues because of disruptions in the business.

This report can be customized so that you can specify the issue; for example, a match rate of less than ninety percent could be identified as an issue and flagged by this report.

JOB ID	SUBSCRIPTION	START TIME	OUTCOME	FILES_PROCESSED	BAD_RECORDS
1010	CRM	2016-11-24 14:15:00	FAILED	0	0
1002	CRM	2016-11-23 14:15:00	COMPLETE	2	4
1000	CRM	2016-11-23 11:40:03	COMPLETE	3	11

Match Rate

Identifies the long term trend in ACT and ASK match rate for a given subscription.

When you load the template, the subscription name parameter must be defined in the query:

```
job.subscription ilike '%INSERT SUBSCRIPTION NAME HERE%'.
```



JOB ID	JOB TYPE	SUBSCRIPTION	START TIME	HCP'S PROCESSED	HCO'S PROCESSED	HCP.MATCH.ACT	HCP.MATCH.ASK	HCP.MATCH.UNMATCHED	HCO.MATCH.ACT	HCO.MATCH.ASK	HCO.MATCH.UNMATCHED
852	source	CRM	2016-11-16 14:15:00	433	44	389	21	23	38	3	3
862	source	CRM	2016-11-17 14:15:00	442	39	397	23	22	35	2	2
876	source	CRM	2016-11-18 14:15:00	388	36	348	19	21	31	3	2

No Files Processed

Identifies the long term trend in jobs without any files or records processed for a subscription.

When you load the template, the subscription name parameter must be defined in the query: `AND job.subscription ilike '%INSERT SUBSCRIPTION NAME HERE%'`

Results (1 record)

JOB ID	JOB TYPE	SUBSCRIPTION	START TIME	HCP'S PROCESSED	HCO'S PROCESSED	JOB.OPENED.ISSUES	INPUT.FILES.PROCESSED
917	source	change_request_v	2016-11-21 14:22:30	1	0	1	0

Records Processed

Average number of records processed for a given subscription over the past 12 months. Use this report template to identify the long term trend for the records processed for a subscription.

When you load the template, the subscription name parameter must be defined in the query: `job.subscription = 'INSERT_SUBSCRIPTION_HERE'`

JOB TYPE	SYSTEM	SUBSCRIPTION	AVG_NUM_OF_HCP_PROCESSED_OVER_12_MONTHS	AVG_NUM_OF_HCO_PROCESSED_OVER_12_MONTHS	AVG_NUM_OF_ADDRESS_PROCESSED_OVER_12_MONTHS	AVG_NUM_C
source	CRM	CRM	433	44	712	274

Source Job Details

List all of the jobs for a particular source subscription within the last three months.

When you load the template, the subscription name parameter must be defined in the query: `AND subscription = 'INSERT SOURCE SUBSCRIPTION HERE'`

JOB ID	JOB TYPE	SYSTEM	SUBSCRIPTION	START TIME	END TIME	CURRENT STAGE	OUTCOME	TRIGGER	STARTED BY	FTP PATH	HCP'S PROCESSED	HCO'S PROCESSED	ADDRESSES PROCESSED	LICE ¹ PROC
551	source	CRM	CRM	2016-10-29 15:15:00	2016-10-29 15:15:26	FinalStage	COMPLETE	SCHEDULED	System	inbound/dasource	433	44	512	121
527	source	CRM	CRM	2016-10-26 15:15:00	2016-10-26 15:15:23	FinalStage	COMPLETE	SCHEDULED	System	inbound/dasource	442	39	483	104
535	source	CRM	CRM	2016-10-27 15:15:00	2016-10-27 15:15:12	FinalStage	COMPLETE	SCHEDULED	System	inbound/dasource	388	36	491	88

Target Job Details

List all of the jobs for a particular target subscription within the last three months.

When you load the template, the subscription name parameter must be defined in the query: `AND subscription = 'INSERT TARGET SUBSCRIPTION HERE'`



JOB ID	JOB TYPE	SYSTEM	SUBSCRIPTION	START TIME	END TIME	CURRENT STAGE	OUTCOME	TRIGGER	STARTED BY	FTP PATH	HCPS PROCESSED	HCOS PROCESSED	ADDF PROC
471	target	CRM	CRM_export	2016-10-21 08:14:00	2016-10-21 08:14:02	FinalStage	COMPLETE	SCHEDULED	System	outbound/redshift/redshiftExporter/	256	27	151
478	target	CRM	CRM_export	2016-10-22 00:14:00	2016-10-22 00:14:03	FinalStage	COMPLETE	SCHEDULED	System	outbound/redshift/redshiftExporter/	233	24	117
479	target	CRM	CRM_export	2016-10-22 04:14:00	2016-10-22 04:14:02	FinalStage	COMPLETE	SCHEDULED	System	outbound/redshift/redshiftExporter/	207	18	98

Create and schedule a report

1. On the Network menu bar, click **Reports > All Reports**.
2. Click **Add Report**.
3. In the Add Report dialog, find the **Job** heading. Select the report template for the problem you are trying to identify; for example, **Jobs with Issues**.
4. Click **Add from template**.
5. Customize the report to meet your business requirements.
6. Click **Run**.
7. In the Run Report dialog, choose **Yes** to send the results in an email and click **Run Report**.

View the results in your email and then return to the report template to further customize or complete the report.

8. In the **Schedule** section, select **Enabled** and schedule the report to run regularly.
9. In the **Share Report** section, add email notification recipients.
10. **Save** the report.

Job statistics reports can also be created using the **Job Summary** report type on the **Record Details** tab in Ad Hoc Queries. The report can include a maximum of 25 statistics.

▼ 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.
Change Request	Data Change Requests information including details about the fields that changed.
Suspect Match	Suspect Match tasks and the matching rules that triggered the match.
Reference Data	Reference Data details including type, region and translations.
Job Summary	Summary information about source and target jobs.

▼ COLUMNS

Available Columns

Job Details

▼ Job Stats Summary

ADDRESS Added

ADDRESS Archived

ADDRESS Candidates Added

ADDRESS Deleted

ADDRESS Invalidated

ADDRESS Merged

ADDRESS Not Loaded

ADDRESS Rows Parsed

ADDRESS Rows Read

ADDRESS Updated

CUSTOMKEY Added

Selected Columns

▼ Job Details

Job ID

Job Type

Subscription

Start Time

End Time

Outcome

Started By

HCPs Processed

HCOs Processed



MATCH LOG REPORT

Administrators and data managers can now run reports on the match logs that are created from source subscriptions. Match logs can contain many records, so using reports makes it easier to analyze the data to discover the effectiveness of your match rules and data groups. Network provides templates to help you begin your analysis.

To run a report on match logs:

1. On the Network menu bar, click **Reports > Ad Hoc Queries**.
2. Click the **Advanced** tab.
3. In the query window, click **Load query from template**.
4. In the Load Query dialog, find the **Match Log** heading. Four templates are available:
 - Count of ACT, ASK and Unmatched
 - Count of Match Type (Act, ASK) by feature set
 - Count of record pairs per data group
 - Match log attribute comparison
5. Select a template and click **Load**.

The report loads into the query window.

6. Click **Run**.

The report runs and the results display in the **Results** section.

Templates

Review the templates and example results to understand the information that you can view in the report results.

Count of ACT, ASK and Unmatched

Use this template to see a summary of the match jobs available.

Results (6 records)					
JOB ID	ENTITY TYPE	ADVICE	COUNT	PERCENTAGE	TOTAL
6	HCP	ACT	1	50	2
6	HCP	UNMATCHED	1	50	2
9	HCP	UNMATCHED	1	100	1
9	HCP	ACT	3	0	496
9	HCP	ASK	27	5	496
9	HCP	UNMATCHED	426	93	496

Count of Match Type (Act, ASK) by feature set

This template helps you to analyze your match data by feature set.

When you load the template, the `file_path` parameter has to be defined to see results; for example, `file_path` like `'%HCP%'` and `job_id = 9`.



Results (9 records)

Table Chart

FEATURES	ADVICE	PAIR_COUNT	PERCENTAGE	TOTAL
	UNMATCHED	427	93	457
full names are similar, city is the same	ASK	10	2	457
names are exactly identical, HCPType is identical, specialties overlap, state is the same	ASK	9	1	457
names are identical, address matches	ASK	3	0	457
names are identical, address matches, HCPType is identical, specialties overlap	ASK	2	0	457
names are identical, address line 1 is the same	ASK	2	0	457
names are exactly identical, specialties overlap, address line 1 is the same, city is the same	ACT	1	0	457
names are exactly identical, address matches, HCPType is identical, specialties overlap	ACT	2	0	457
names are similar, address line 1 is the same	ASK	1	0	457

Displaying 1 to 9 of 9 Show 25 1 1 of 1 < >

Count of record pairs per data group

This helps you to analyze the data groups that you have defined in your match configuration.

When you load the template, the `file_path` parameter has to be defined to see results; for example, `file_path` like `'%HCP%'` and `job_id = 9`.

Results (21 records)

Table Chart

GROUP_NAME	OUTCOME	GROUP_COUNT	GROUP_PERCENT	TOTAL
addresses__v__administrative_area__v__hcp_type__x__is_externally_mastered__v__last_name__v__primary_country__v		426	13	3196
first_name__v__is_externally_mastered__v__last_name__v__primary_country__v		427	13	3196
addresses__v__administrative_area__v__addresses__v__locality__v__hcp_type__x__is_externally_mastered__x__last_name__x__primary_country__v		426	13	3196
addresses__v__locality__v__first_name__v__is_externally_mastered__v__primary_country__v		427	13	3196
addresses__v__administrative_area__v__addresses__v__locality__v__hcp_type__x__is_externally_mastered__x__primary_country__v		426	13	3196
addresses__v__locality__v__is_externally_mastered__v__last_name__x__primary_country__v		427	13	3196
addresses__v__administrative_area__v__hcp_type__x__is_externally_mastered__v__last_name__v__primary_country__v__specialty__t__v		426	13	3196
addresses__v__administrative_area__v__addresses__v__locality__v__hcp_type__x__is_externally_mastered__x__last_name__x__primary_country__v	X	16	0	3196
addresses__v__administrative_area__v__addresses__v__locality__v__hcp_type__x__is_externally_mastered__x__primary_country__v	X	17	0	3196
addresses__v__administrative_area__v__hcp_type__x__is_externally_mastered__v__last_name__v__primary_country__v__specialty__t__v	M	14	0	3196
addresses__v__administrative_area__v__hcp_type__x__is_externally_mastered__v__last_name__v__primary_country__v__specialty__t__v	X	16	0	3196

Match log attribute comparison

This report compares attributes from the match log.

When you load the template, the `job_id`, `entity_type`, and `attribute_list` parameters must be defined to see results.

In the example results below, the parameters are defined as `job_id = '721'`, `entity_type = 'HCO'` and `attribute_list = 'addresses__v.address.line_1__v'`. The report results compare addresses between the source and match value.

Results (103,258 records)

SOURCE_VALUE	MATCH_VALUE
8801 Baltimore National Pike Ste 11D	8801 Baltimore National Pike Ste 11
3333 S Pinnacle Hills Pkwy Ste 300-A	3333 S Pinnacle Hills Pkwy Ste 300A
5401 Veterans Memorial Pkwy Ste 101a	5401 Veterans Memorial Pkwy Ste 101
13215 SE Mill Plain Blvd Ste C8901	13215 SE Mill Plain Blvd Ste C8-901
17175 Sw Tualatin Valley Hwy Ste B	17175 Sw Tualatin Valley Hwy Ste B4
3098 Campbell Station Pkwy Ste 201	3098 Campbell Station Pkwy Ste A201
200 Westage Business Ctr Dr Ste 220	200 Westage Business Ctr Dr Ste 230
1700 E Cesar E Chavez Ave Ste 100	1700 E Cesar E Chavez Ave Ste L100



Match logs must be enabled in the source subscription to use this feature.

Available match logs

New match logs are immediately available to report on but are purged after three days. You can make older logs available for reports again using the **View Match Log** button on the source subscription Job Details page. Loading the log might take up to ten minutes. When the log is loaded, users are automatically redirected to the **Reports** page.

Data Quality Reports

CLONING AN ENTITY GROUP

Administrators can now clone existing entity groups to create a new group. Entity groups can contain many test cases, so cloning helps administrators to more easily create a group without having all add all of the test cases.

1. On the Network menu bar, click **Reports > Quality Reports**.
2. On the Data Quality Reports page, click an entity group.
3. On the entity group page, click **Clone**.

The entity group clones.

4. Define a name and make any required changes to the settings and test cases.
5. **Save** your changes.

Concur Connector

PERSONALIZE CONCUR SEARCH

System Admin users can now update the following settings to customize search results according to the Concur user's settings:

- **Country:** Return results for the user's country only.
- **Language:** Return results in the user's specified language.

Note: Reference codes (for example, specialty, degree) are returned for the user's language only.

To personalize Concur search:

1. In the Admin console, click **System Interfaces > Concur Connector**.
2. In the **System** section, next to **Personalize based on Concur User**, select one or both of the following options:
 - **Country** - Display results for the Concur user's country only.
 - **Language** - Display results in the Concur user's language.



Concur Connector Cancel Save

▼ System

Connector Enabled Yes No

System

Attendee Type Code

Download HCPs from OpenData

Personalize based on Concur User Country Language

▼ Connection Settings

Concur User

Password

Please review the user's [Data Visibility Profiles](#).

3. **Save** your changes.

Note: Personalization requires that the Concur User and Password are defined and tested.

MAP FIELDS BETWEEN CONCUR AND NETWORK

System Admin users can map Concur fields to Network fields or objects.

Mapping the fields defines the fields that users can search on in Concur and the fields that are returned to Concur after a Network search.

Concur Connector Cancel Save

► System

► Connection Settings

▼ Field Mappings

Reference field mappings are configured in the [Reference Alias](#) page.

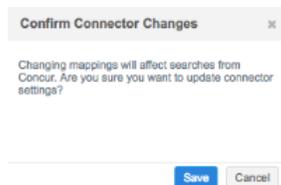
CONCUR FIELD	NETWORK FIELD	CONCUR DATA TYPE	LENGTH
<input type="text" value="First Name"/>	<input type="text" value="First Name"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>
<input type="text" value="Last Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="Text"/>	<input type="text" value="132"/>
<input type="text" value="Title"/>	<input type="text" value="Prefix"/>	<input type="text" value="Text"/>	<input type="text" value="32"/>
<input type="text" value="External ID"/>	<input type="text" value="Network Entity ID"/>	<input type="text" value="Text"/>	<input type="text" value="48"/>
<input type="text" value="Institution/Practice"/>	<input type="text" value="Network Entity ID"/>	<input type="text" value="Text"/>	<input type="text" value="150"/>
<input type="text" value="Custom 13 (Recipient Type/Profession...)"/>	<input type="text" value="Degree 1"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>
<input type="text" value="Custom 14 (NPI Number)"/>	<input type="text" value="NPI"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>
<input type="text" value="Custom 7 (License Number)"/>	<input type="text" value="License"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>
<input type="text" value="Custom 8 (State of License)"/>	<input type="text" value="Licensing Authority"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>
<input type="text" value="Custom 9 (Specialty Description)"/>	<input type="text" value="Specialty 1"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>
<input type="text" value="Custom 15 (Primary Practice Address ...)"/>	<input type="text" value="Address Line 1"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>
<input type="text" value="Custom 16 (Primary Practice Address ...)"/>	<input type="text" value="Address Line 2"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>
<input type="text" value="Custom 17 (Primary Practice Address ...)"/>	<input type="text" value="Address Line 3"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>
<input type="text" value="Custom 18 (Primary Practice City)"/>	<input type="text" value="City"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>
<input type="text" value="Custom 19 (Primary Practice State)"/>	<input type="text" value="State/Province"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>
<input type="text" value="Custom 20 (Primary Practice Zip Code)"/>	<input type="text" value="Zip/Postal Code"/>	<input type="text" value="Text"/>	<input type="text" value="100"/>

[Add Field Mapping](#)

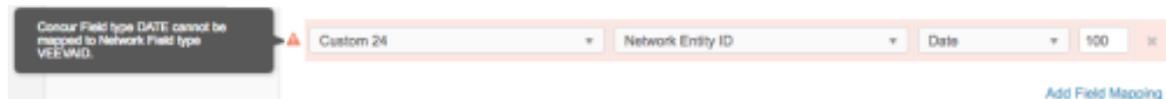


To configure the field mappings:

1. In the Admin console, click **System Interfaces > Concur Connector**.
2. In the Field Mappings section, click **Add Field Mapping**.
3. In the **Concur Field** column, select a Concur field from the drop down list. Suggested names are in parentheses. For example, `Custom 8 (State of License)`.
4. In the **Network Field** column, select a Network field from the drop down list. Ensure that the Network field is compatible with the Concur field. The Network fields are organized by entity type: License, Parent HCO, HCP, Address, and Custom Key.
5. In the **Concur Data Type** column, select the type of data from the drop down list. The Network data type must be compatible with the Concur data type. For example, most fields have a `text` data type (first name, address, phone, license number). Network IDs and Alternate Keys should be mapped as text field types in Concur.
6. In the **Length** column, type the maximum length of the Concur field. If the Network field is longer than the maximum Concur field length, a truncated value is sent to Concur.
7. **Save** your changes.
8. In the Confirm Connector Changes dialog, click **Save**.



If there are compatibility issues between the Concur and Network data field types, when you save your changes, a warning displays beside the mapping with a message. The compatibility issue must be resolved before you can save your changes.



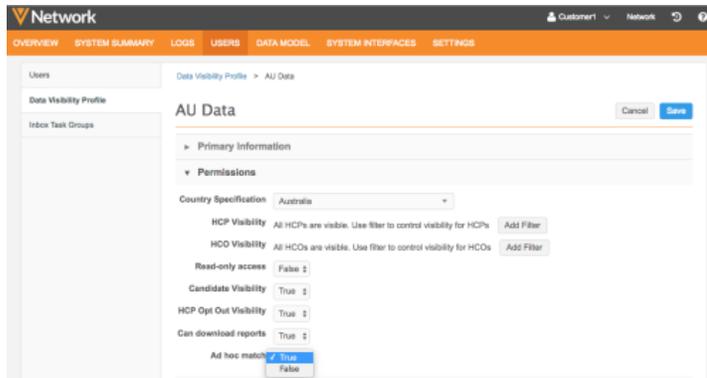
Data visibility profiles

AD HOC MATCH PERMISSIONS

By default, all user types have access to the **Ad Hoc Match** page for matching an external data source to the data in Network. Now, administrators can define ad hoc match permissions using data visibility profiles. The permission is set to *True*, by default.

To set ad hoc match permissions on a data visibility profile:

1. In the Admin console, click **Users > Data Visibility Profile**.
2. Select the name of a data visibility profile.
3. In the profile, click **Edit**.
4. In the Permissions section, beside **Ad hoc match**, click the list to add (*True*) or remove (*False*) permissions.



5. **Save** your changes.

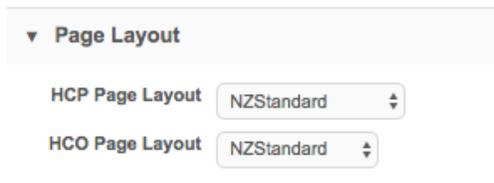
PAGE LAYOUT

A page layout has been added for New Zealand. Previously, customers with New Zealand data used the Australia page layout in their data visibility profiles. Using the New Zealand page layout, users can edit address fields that are not editable in the Australia page layout.

The new page layout includes two fields that are editable for New Zealand addresses:

- Address Line 3
- Dependent locality

To use the page layout, select **NZStandard** as the HCP and HCO page layout in the data visibility profile.



These editable fields display on the Profile page and in DCRs.

Data validation rules

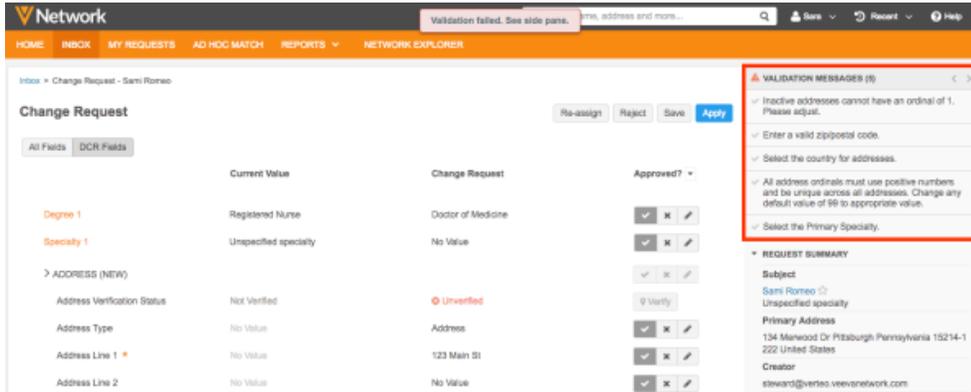
To improve the quality of the data in your Network instance, administrators can create and manage data validation rules. These rules enable you to proactively address data completeness and accuracy. Data validation rules apply to add and change requests; they are not applied during data loading through source subscriptions.

Rules can be set up for any list of countries and the error messages can be defined in any Network enabled language.

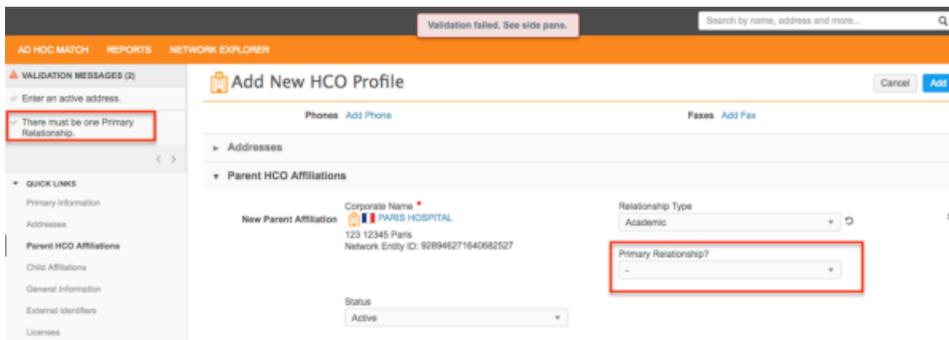
When data stewards or data managers process a record, rules alert them to quality issues. The issues must be fixed before the record can be processed. Validation messages display in DCRs and on the Profile page.



In add or change requests (DCRs), validation messages display in the top right corner.



On the **Profile** page, validation messages display in the left navigation.



Applicable records and fields

Rules in your customer instance apply to any customer-owned fields on valid master records. They are also applied to all customer-owned records. Customer-owned (gray) records can exist in any of the following situations:

- customer-owned (gray) record with a Veeva-owned (orange) Parent HCO
- customer-owned (gray) record with a third party-owned (blue) Parent HCO
- Veeva-owned (orange) record with a customer-owned (gray) Parent HCO
- third party-owned (blue) record with a customer-owned (gray) Parent HCO

Note: Data validation rules do not run when customer-owned (gray) child objects are added to master (orange or blue) records on the Profile page. A DCR is routed to the customer steward inbox where the steward can validate the record.

Data validation rules do not apply to Veeva OpenData or third party-owned fields and records. Data validation rules are also not applied to *Under Review* records (records that are created if the **Create Unverified** setting is enabled in the workflow settings).



CREATING AND TESTING RULES

Create and test data validation rules in your sandbox environment. Thoroughly test the rules, thinking about all of the different scenarios where each rule might fail. Testing will ensure that data steward and data manager productivity isn't negatively impacted if there are issues with rules. When the rules have been tested and approved, recreate them in your production environment.

Consider the following when you are working with data validation rules:

- Use reports to analyze the data before implementing rules; for example, run a report to see how many HCP records do not list a specialty. This will help you to know how many records a rule will fail on and how often a data steward or data manager will be interrupted by messages.
- If you create rules that include fields that are not part of the page layout, the rules might trigger, but data stewards and data managers cannot see the field to fix the issue.
- All active reference codes for each entity (HCP, HCO, and HCP & HCO) are available to use for data validation rules. Only reference codes that are completely inactive (all countries have been moved to the inactive list, or the code is made inactive) will not be shown.
- If you inactivate a reference code that is used in an existing rule, the rule might not fail any longer because records should not be using that inactive code.
- Identify a support process. Data stewards and data managers should know who they can contact if they have issues with the rules.
- To set up many rules for a large list of countries, set up a template by creating a rule with the countries selected. Leave the rule disabled but copy it to create new rules. This way, you don't have to select the countries for each new rule.
- Create separate rules when the criteria are different.

Example: If you want to create a validation rule to ensure that all HCP and HCO addresses in China, Japan, and Australia include state information, but in Japan you want to validate this on active addresses only, you must create two separate rules. If the criteria for entities is different, create the rule for that entity specifically, do not use the HCP & HCO section.

	Rule 1	Rule 2
Entity	HCP & HCO	HCP & HCO
Country	Japan	China, Australia
Object Type	Address	Address
Filters	Field = Status Condition = Equals Value = Active	
Conditions	Field = State/Province Condition = Is Null	Field = State/Province Condition = Is Null



VIEW EXISTING DATA VALIDATION RULES

In your Network instance, several predefined rules are provided but are not enabled, by default. You can use these rules as they are, modify them for your purposes, or use them as examples to create new rules. Rules are sorted by their enabled state and then by rule name.

To see the list of data validation rules, in the Admin console, click **System Interfaces > Data Validation Rules**.

Data Validation Rules

Data Validation rules allow you to validate your records for accuracy, completeness and consistency. Rules created on this page are applied when your data stewards or data managers touch an individual record, either when processing a change request or when proactively updating a record themselves. When their changes are applied they are notified of any data validation issues on that record as per the rules below, and all issues must be resolved before they finish updating the record. These rules are applied to any data you own and manage in this instance, including both customer owned fields as well as customer owned records.

Search Rules

HCP				
Rule Name	Message	Countries	Enabled	
HCPGender	Select a gender	Andorra, Argentina, Austria, A...	<input checked="" type="checkbox"/>	
LicenseNumberThenBody	Select a licensing body	Andorra, Austria, Belgium, Sw...	<input type="checkbox"/>	
ValidHCPName	Remove invalid characters from First or Last N...	Andorra, Argentina, Austria, A...	<input type="checkbox"/>	
+ Add Rule				
HCO				
Rule Name	Message	Countries	Enabled	
HCOLicenseNumber	License Number Required for HCO	United States	<input checked="" type="checkbox"/>	
HCOType	Select an HCO Type	Andorra, Argentina, Austria, A...	<input type="checkbox"/>	
MajorClassOfTrade	Select the Major Class of Trade	Andorra, Argentina, Austria, A...	<input type="checkbox"/>	
+ Add Rule				
HCP & HCO				
Rule Name	Message	Countries	Enabled	
AddressAdminArea	All addresses require a state	Andorra, Argentina, Austria, A...	<input type="checkbox"/>	
AddressCountryRequired	Select the country for addresses	Andorra, Argentina, Austria, A...	<input type="checkbox"/>	
ParentHCORelationshipType	Select a Relationship Type	Andorra, Argentina, Austria, A...	<input type="checkbox"/>	
ParentHCOUniquePrimaryRelationship	Only one Primary Relationship is allowed	Andorra, Argentina, Austria, A...	<input type="checkbox"/>	
+ Add Rule				

For any rule, the following activities are available:

- **Enable and disable** - Activate the rule. In the row for the rule, click the red **x** in the **Enabled** column. The icon changes to a green check mark when the rule is enabled. Click the **green check mark** icon to disable the rule. All seeded rules are disabled by default.
- **Modify** - Change the rule so that it applies to your Network instance; for example, change the country. Click the rule to expand it so that you can customize it for your Network instance. **Save** your changes.
- **Copy** - Use an existing rule to create a new rule using similar formats. Hover over the rule until a **Cog** icon  displays. Click the icon and select **Copy**. In the Copy Rule message dialog, click **Continue**. Customize the rule for your Network instance and **Save** your changes.
- **Delete** - Remove the rule from your Network instance. Hover over the rule until a **Cog** icon  displays. Click the icon and select **Copy**.

CREATE A DATA VALIDATION RULE

Administrators create and manage data validation rules in their Network instance.

1. In the Admin console, click **System Interfaces > Data Validation Rules**.
2. On the Data Validation Rules page, decide the entity that the rule applies to and click **+Add Rule** in that section.
 - **HCP** - Use for rules that apply to HCP records and their child objects only.



- **HCO** - Use for rules that apply to HCO records and their child objects only.
 - **HCP & HCO** - Use for rules where the field apply to both HCP and HCO records. Also, use for creating rules only for child objects: Address, License, and Parent HCO.
3. Type a unique **Rule Name**. The name cannot have spaces; for example: HCPType.
 4. Type a **Description**. This description helps you identify what the rule is for. Data stewards and data managers do not see this description in the data validation rule message.
 5. Select the **Countries** that this rule applies to.

Tip: If the rule applies to many countries, choose **Select All** and then remove the countries that the rule does not apply to.

Entity: HCP Rule Name: HCPType
 Description: All HCPs must have a type selected.
 Countries: United States X France X
 Enabled:

6. The **Enabled** check box is selected by default. Clear the check box if you do not want to enable the rule immediately after it is created.
7. Expand the **Failure Message** section and click **+Add Language**. At least one language and message must be defined.
 - a. Select the **Language** from the drop down list.
 - b. Type the **Message**, in that language, that the data steward or data manager will see in the data validation rule. The message should be clear and short; for example, for a rule that checks that each HCP has a type, a good message is `Select an HCP Type`.
 - c. Click **+Add Language** to add more languages and your own translated message.

FAILURE MESSAGE
 LANGUAGE MESSAGE
 English Select an HCP type. X
 French Sélectionnez un type de HCP. X
 + Add Language

If a language and message isn't defined for a language selected on the data steward's or data manager's profile, the default language of your Network instance is used.

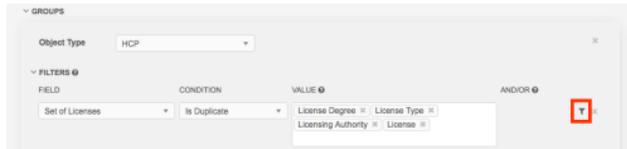
Note: This is the only message that a data steward or data manager sees. If they have issues with validation rules, they will reference this message. Ensure that it is unique.

8. In the **Groups** section, click **+Add Group** and select the **Object Type**.
9. Optional. In the **Filters** section, click **+Add Filter** to limit your rule to run on specific records; for example, if you want the rule to apply only to active records, add a status filter (**Field** = HCP Status, **Condition** = Equals, **Value** = Active).

GROUPS
 Object Type: HCP X
 FILTERS
 FIELD CONDITION VALUE AND/OR
 Status Equals Active X
 + Add Filter
 CONDITIONS
 FIELD CONDITION VALUE AND/OR
 HCP Type Is Null X
 + Add Condition



- a. **Field** - Choose the field for this filter. The fields in the drop down list apply to the object selected for this rule.
- b. **Condition** Choose one of the available conditions.
- c. **Value** - If the **Condition** that you chose requires a value, type the value. The value might be free text (for example, type a name) or a drop-down list of options. Multiple values can be defined.
- d. **And/Or** - This is available only if multiple filters are defined and defaults to AND if there are multiple filters.
- e. If you selected a set of fields (Set of Addresses, Set of Licenses, Set of Parent HCOs) an additional **Filter** icon displays so that you can filter on child objects within that set.



Click the **Filter** icon and define the child object filter.



If you add a child object filter, the **Filter** icon turns blue to indicate a filter is added.

- f. To define more filters, click **+ Add Filter**.
10. In the **Conditions** section, click **+Add Condition** and define the condition that will cause the rule to fail.

For example, you can apply a condition so that any active HCPs (filtered in Step 9) that do not identify an HCP type causes the rule to fail (**Field** = HCP TYPE, **Condition** = IS NULL).

- a. **Field**- Choose the field for this condition. The fields in the drop down list apply to the object selected for this rule.
- b. **Condition** - Choose one of the available conditions.
- c. **Value** - If the **Condition** that you chose requires a value, type the value. The value might be free text (for example, type a name) or a drop-down list of options. Multiple values can be defined.
- d. **And/Or** - This is available only if multiple conditions are defined and defaults to AND if there are multiple conditions.
- e. If you selected a set of fields (Set of Addresses, Set of Licenses, Set of Parent HCOs) an additional **Filter** icon displays so that you can filter on child objects within that set. If you add a child object filter, the **Filter** icon turns blue to indicate a filter is added.
11. To add another object, click **+Add Group** and add filters and conditions for that object.
12. **Save** your rule.



When data stewards or data managers process records, the enabled rule runs on any records that it applies to. If the conditions are met, the rule fails and the data steward or data manager sees the validation message. The record cannot be processed until the issue is addressed.

UNDERSTANDING FILTERS AND CONDITIONS

In the data validation rules, filters and conditions work together to determine the records that fail with validation errors.

Filters

Use filters to limit your query to specific records. Filters are optional.

Examples of things that you might want to filter records on:

- Active records (filter on the status of objects, HCPs, HCOs, Addresses, Licenses, or Parent HCOs.)
- Non-candidate records (check that the candidate flag field is set to *False*)
- Addresses in multiple countries (include the Address Country in your filter, otherwise the rules will be applied to all addresses for records in the specified primary country)

Conditions

Use conditions to define the situation that will cause the rule to fail. At least one condition is required; for example, add a condition so that the validation rule fails on HCP records that do not list a specialty.

Condition operators

The following operators are available for adding filters and conditions to a rule:

- **Find / Not Find** - Values are not case-sensitive.
- **Equals / Not Equals** - Values are case-sensitive
- **Is Null / Is Not Null** - Can be used for reference fields.
- **In / Not In** - Used for string and reference fields. It specifically looks for values in fields and it ignores blanks or nulls.
- **Exists / Does Not Exist** - Used to determine if a child object (address, license, or Parent HCO) exists or not within a rule. Choose one of the three "set" of fields for this condition. No value is required. Note that rules are only applied to customer (gray) records. If there are only orange or blue child objects, they are not detected during this check - only gray records are flagged.
- **Is Duplicate** - Used to determine if a child object (address, license, or Parent HCO) has duplicate values; for example, duplicate licenses on the same HCP. Identify the fields that you want to compare within the set in the **Value** column. The comparison is exact. If two records are identical but one field used in the comparison has a value and the other does not (for example, license type) the records are not considered duplicates. Note that rules are only applied to customer (gray) records. If there are duplicates between gray, orange or blue fields, they are not detected during a duplicate validation check - only duplicate gray records are flagged.



- **Match Regular Expression / Not Match Regular Expression** - Can be used for values are free text; for example, to find invalid characters in name fields (! ? + = # \$ % & *). (Network uses Java Regular Expressions).
- **Less Than / Greater Than** - Can be used for fields containing numeric values; for example, fields with rankings or dates.
- **Between** - Can be used for fields containing numeric values; for example, fields with rankings or dates.

Examples for using filters and conditions

Review the following examples to understand how to use filters and conditions to define your data validation rules.

Example 1 - Using one filter and one condition

This data validation rule is limited to run on all active HCP records. The rule fails on active HCP records that do not have a specialty listed.

Filters: Field = HCP Status, Condition = Equals, Value = Active

Conditions: Field = Specialty 1, Condition = Is Null

Example 2 - Using no filters with two conditions (using AND)

This data validation rule runs on all HCP records. The rule fails on active HCPs and any HCPs (active or inactive) that do not have a specialty listed.

Filters: none

Conditions: Field = HCP Status, Condition = Equals, Value = Active, And/Or = AND

Conditions: Field = Specialty 1, Condition = Is Null

Note that the outcomes of **Example 1** and **Example 2** are the same, but using a filter saves on performance and productivity because the rule stops checking as soon as a filter does not apply.

Example 3 - Using filters with two conditions (using OR)

This data validation rule is limited to run on all active HCPs records. The rule fails on active HCPs that do not have a first name or last name listed.

Filters: Field = HCP Status, Condition = Equals, Value = Active

Conditions: Field = First Name, Condition = Is Null, And/Or = OR

Conditions: Field = Last Name, Condition = Is Null

**Example 4 - Using no filters with multiple conditions (using AND and OR)**

This data validation rule runs on all HCP records. The rule fails on active HCPs that do not have a first name and all HCPs (active or inactive) that do not have a last name. The absence of a filter to check for active HCPs means that the Active HCP Status condition is grouped with the first name condition only. The last name check is done for all HCPs, regardless of status.

Filters: None

Conditions: Field = HCP Status, Condition = Equals, Value = Active, And/Or = AND

Conditions: Field = First Name, Condition = Is Null, And/Or = OR

Conditions: Field = Last Name, Condition = Is Null

Example 5 - Using no filters with multiple conditions (using AND)

This data validation rule runs on all HCP records. The rule fails on active HCPs that do not have a first name *and* do not have a last name.

Filters: None

Conditions: Field = HCP Status, Condition = Equals, Value = Active, And/Or = AND

Conditions: Field = First Name, Condition = Is Null, And/Or = AND

Conditions: Field = Last Name, Condition = Is Null

Example 6 - Using a Regular Expression in a rule

This data validation rule runs on all License records. The rule fails on active licenses that do not have a two-character entry in the Licensing Authority field. The regular expression checks that letters are used and not numbers, and ensures the length is exactly two characters. If the entry in the Licensing Authority field contains something other than uppercase or lowercase letters and is not two characters in length, the rule will fail.

Filters: Field = License Status, Condition = Equals, Value = Active

Conditions: Field = Licensing Authority, Condition = Not Match Regular Expression, Value = `^[a-zA-Z]{2}$`

STEWARDED DATA VALIDATION MESSAGES

Data steward and data manager users see failed validation messages when they are updating records within a DCR or directly on the profile page. Five messages can display at one time. Click the arrow (>) to see the next five messages. A maximum of 100 messages can display. If there are more than 100 messages for a record, the data steward or data manager must resolve all of the first 100 validation issues and click **Apply**. The next group of messages, up to 100, will then display.

The **check mark** beside the validation message can be used to track the messages as they're resolved.



Validating merged records

After manually merging a record on the profile, the data steward or data manager can click **Validate** to check the record against the data validation rules in their Network instance. If there are any quality or completeness issues in the merged records, data validation messages will display and must be resolved before the record can be saved. Data validation rules are not run automatically when records are merged. The **Validate** button can be used at any time to validate a profile.

INACTIVE REFERENCE CODES

When you're working with data validation rules, any reference codes set to be inactive for a particular country will be hidden from the drop down lists. This will be determined by the countries that you choose in each rule. Any code that is active in at least one of the selected countries will be available to use in the rule. When data validation rules were introduced in version 9.5.1, codes that were inactive for a country would not be available to any of the selected countries in a rule.

If a rule uses a reference code that is later inactivated, nothing changes. The rule might not work because no records use that code, but the rule itself will exist and no errors will occur. If an administrator changes the rule and selects another code, the now-inactive code will not be available for selection in the drop down list. This behavior is consistent with the behavior of inactive reference codes in other parts of the Network user interface.

Also, if an inactive reference code exists in a rule and an administrator changes the rule, the inactivated code will be missing from the drop list down and the value will be empty. If the administrator makes other changes on the rule, the **Save** button will be enabled, but if the value of the reference data is not re-selected from the drop down list, the data validation rule cannot be saved and an error displays about the missing value.

If a reference code is activated or inactivated for a country, the reference code drop down list can be refreshed using one of the following ways:

- changing the country
- expanding the rule
- refreshing the page



Logging

The following sections describe updates to Logs for this release.

REVIEW SEARCH HISTORY

Administrators can review all of the searches that occurred through the API or user interface in their Network instance. Use this information to identify the users that are accessing the data.

To view the search logs:

1. In the Admin console, click **Logs > Search Audit History**.
2. Select a specific time period in the **Quick history** drop down list, or specify a date range.
3. Click **Get History**.

The audit history displays on the page.

TIMESTAMP	USER NAME	STATUS	FOUND	RETURNED	QUERY	DATA TYPES	ORIGIN
2016-09-12 10:36:43 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	3766	20	ho	HCO,HCP	Network Explorer
2016-09-12 10:27:25 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	13220	20	ho	HCO,HCP	Search Bar
2016-09-12 10:28:58 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	13220	20	ho	HCO,HCP	Search Bar
2016-09-12 09:47:41 NJT	customer1.admin@demo.veevanetwo...	SUCCESS	7	7	*	HCO,HCP	Search Bar
2016-09-12 09:47:29 NJT	customer1.admin@demo.veevanetwo...	SUCCESS	7	7	*	HCO,HCP	Search Bar
2016-09-12 09:47:24 NJT	customer1.admin@demo.veevanetwo...	SUCCESS	136089	20	*	HCO,HCP	Search Bar
2016-09-12 08:24:42 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	997	20	james	HCO,HCP	Network Explorer
2016-09-12 06:41:32 NJT	customer1.admin@demo.veevanetwo...	SUCCESS	0	0	*	HCP	Profile - Child Search
2016-09-12 05:00:50 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	3	3	robert.hoffman	HCO,HCP	Search Bar
2016-09-12 05:00:49 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	146	20	rober	HCO,HCP	Network Explorer
2016-09-12 05:00:17 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	4563	5	hospital	HCO	Profile - Parent Search
2016-09-12 05:00:16 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	19	5	hoapic	HCO	Profile - Parent Search
2016-09-12 04:58:58 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	3	3	robert.hoffman	HCO,HCP	Search Bar
2016-09-12 04:58:14 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	205	20	bob	HCO,HCP	Network Explorer
2016-09-12 03:41:14 NJT	customer1.admin@demo.veevanetwo...	SUCCESS	0	0	*	HCP	UI
2016-09-12 03:41:08 NJT	customer1.admin@demo.veevanetwo...	SUCCESS	136089	20	*	HCO,HCP	Concur
2016-09-12 03:16:45 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	997	20	james	HCO,HCP	UI
2016-09-12 03:10:03 NJT	kassandra.predovic@demo.veevanet...	SUCCESS	2595	20	james	HCO,HCP	UI

The **Origin** column identifies where the search occurred. Searches from Concur are specifically identified. The logs can be filtered by date.

4. To export the data to a .csv file, click **Export to CSV**.

A	B	C	D	E	F	G	H	I
Timestamp (yyyy-MM-dd HH:mm:ss zz)	User Name	Status	Found	Returned	Time (ms)	Query	Data Types	Origin
2016-08-16 15:34:23 EDT	system.admin@network.com	SUCCESS	2	2	105	*	DCR	API
2016-08-16 15:29:55 EDT	system.admin@network.com	SUCCESS	1774	10	711	albany	HCO,HCP	API
2016-08-16 15:29:06 EDT	system.admin@network.com	SUCCESS	3872	20	6606	*	HCO,HCP	UI



TASK AUDIT HISTORY LOG

The Task Audit History log is now available from the **Log** section in the Admin console. It is also still available through the **Inbox**.

ID	TASK ID	ACTION DATE	ACTION TYPE	USER NAME	RELATED ITEMS	MESSAGE
307	528961057203395743	2016-09-12 12:00:41	ChangeState	System	DCR ID: 028961057203395743 Entry ID: 242978994412778506 Job ID: 108	Changed task state from NEW to PENDING...
306	528961057203395743	2016-09-12 12:00:40	ServiceLog	System	DCR ID: 028961057203395743 Entry ID: 242978994412778506 Job ID: 108	Created master change request 2-92896105...
305	528961057203395743	2016-09-12 12:00:39	ServiceLog	System	DCR ID: 028961057203395743 Entry ID: 242978994412778506 Job ID: 108	Set Change Request status to CHANGE_PAR...
304	528961057203395743	2016-09-12 12:00:38	JobResult	System	DCR ID: 028961057203395743 Entry ID: 242978994412778506 Job ID: 108	{\"jobId\":108,\"jobStatus\":\"COMPLETE\",\"effects...
303	528961057203395743	2016-09-12 12:00:36	JobCompletion	System	DCR ID: 028961057203395743 Entry ID: 242978994412778506 Job ID: 108	Job 108 completed with status COMPLETE.
302	528961057203395743	2016-09-12 12:00:34	SubmitJob	System	DCR ID: 028961057203395743 Entry ID: 242978994412778506 Job ID: 108	Submit change request job.
301	528961057203395743	2016-09-12 12:00:24	ServiceLog	System	DCR ID: 028961057203395743 Entry ID: 242978994412778506 Job ID: 108	Set Change Request status to CHANGE_PE...

Users

The following sections define the enhancements to user types for this release of Network.

INTEGRATION USER

API-Only users are being renamed to *Integration User*. Third party data vendors need to upload files, extract DCRs and retrieve the details of the records that they steward from a Network instance. Currently the API-only user is used for this integration, but this has two limitations:

- Other data vendors have access to files on the FTP server.
- Access to the Network APIs is not restricted.

Renaming the *API-Only* user to *Integration User* clarifies the responsibilities of this user type. Along with this change, new permissions for API and FTP are being introduced for all user types. These enhancements are enabled by default.

API Access

Administrators can define the following access to Network APIs for all user types:

- **Allow All** - User can access all Network APIs.

This is the default permission for existing users.

- **Don't Allow** - User has no access and will receive an error if they try to access the API.

This is the default permission for new users.



FTP Access

Existing permissions have been available for **Allow All** and **Don't Allow** to on the files and folders within the Network instance's subdirectory. Now, administrators can define the **Allow Directory** permission to identify access to specific folders.

- **Allow All** - User has complete control over all files and folders.

This is the default permission for existing users.

- **Allow Directory** - User has complete control over a specific subdirectory in that instance's FTP folder. The user cannot access any other directories or anything higher in the file tree

If this option is selected, an **FTP Directory** field displays so administrators can identify the specific subdirectory.

- **Don't Allow** - User has no access to the files and folders. Users receive an error message if they try to log in.

This is the default permission for new users.

To support the **Allow Directory** option, the FTP path is now configurable for all target and source subscriptions.

Exporting the user information to a .csv file identifies all of the FTP and API permissions.

USER PERMISSIONS

Data stewards and standard users can be given access to advanced features.

Network user types have predefined permissions. When administrators create new users, a user type is specified so that the user has access to the areas and functions they need to perform their job responsibilities. Previously, there was no flexibility for permissions for specific users. Now, administrators can provide specific permissions to individual users with the following user types:

Data stewards

- Ad hoc queries - run advanced queries and access reporting templates
- Data quality reports - create, edit, and run reports

Standard users

- Ad hoc queries - run advanced queries and access reporting templates

These permissions can be added to existing users and to new users.



Users > Add New User

Add New User Cancel Save

Primary Information

Status: Active ▼

Username: @network.com

Email:

User type: Data Steward ▼

Inbox Task Groups: US Data Stewards ✕

Data Visibility Profile

Password

Contact Information

Settings

Additional Permissions

Execute Advanced Ad hoc Queries

Create, Modify and Run Data Quality Reports

Adding permissions

To add these permissions to a new user or existing user:

1. In the Admin console, click **Users**.
2. Select an existing user from the list, or click **Add New User**.
3. In the User Type list, select **Data Steward** or **Standard User**.
4. In the **Additional Permissions** section, select the permission to add to this user.
5. **Save** your changes.

PASSWORD LENGTHS

To comply with security policies, administrators can now define a minimum password length of up to 24 characters.

To update the minimum password length:

1. In the Admin console, click **Settings > Security Settings**.
2. Click **Add New Policy**.
3. In the **Minimum Password Length** list, select the minimum length.
4. **Save** your changes.

The updated minimum password length is enforced for new users. Existing users are not affected until they change their password.



My Profile

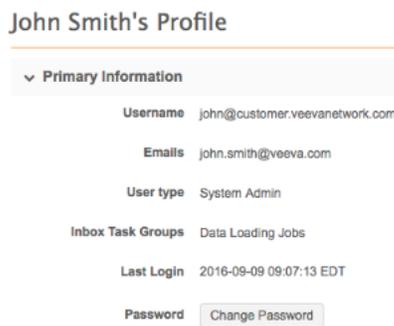
The following sections describe updates in the My Profile section for this release.

CHANGE USER PASSWORDS

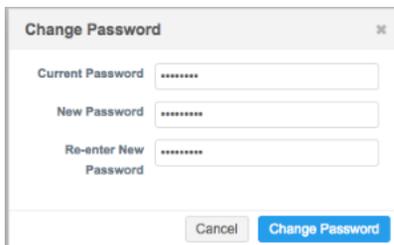
Users can change their passwords at any time in their user profile.

To change a password:

1. On the Network menu bar, click your user name and select **My Profile**.
2. On the profile page, in the Primary Information section, click **Change Password**.



3. In the Change Password dialog, type the required information.



4. To save your changes, click **Change Password**.

The password is updated. The next time you log into Network, use the new password. Note that resetting a password is still available using the **Forgot your password?** link when you log in to Network.

OPT-OUT OF REPORT EMAILS

In the **My Profile** section, users can choose to not receive emails about reports. Notifications are turned on, by default.

To opt-out of receiving report emails, in the **Settings** section, clear the **Notifications** check box.



Dana Stewart's Profile

> Primary Information

> Contact Information

▼ Settings

Timezone (GMT-11:00) Niue Time (Pacific/Niue)

Language English

Locale United States

Notifications Receive Network report notification emails

Usage Feedback Help us improve Network by securely sending usage data

Veeva Support

Sanctions data

Sanctions data from the United States Office of the Inspector General's List of Excluded Individuals and Entities (OIG LEIE) is available to customers who subscribe to Veeva OpenData for the United States. New fields have been added so that sanctions data can be loaded and viewed. HCP or HCO entities that have sanctions from this governing body will be easily identified within Network. Users and downstream systems can now use this data for their individual corporate business requirements.

ENABLING SANCTIONS DATA FIELDS

A series of fields have been added for sanctions data. These fields must be enabled so that you can view the data in the entity profile.

To enable sanctions fields:

1. In the Admin console, click **Data Model > Network Data Model**.
2. Select the **Country** that you want to enable the field for.
3. In the **HCP** or **HCO** section, find the sanctions fields that you want to enable. All of the field names are prefixed with `sanctions_`.

Network Data Model

Country

United States

▼	sanction_address_1_v	Address	Text		✓
▼	sanction_address_2_v	Address	Text		✓
▼	sanction_address_3_v	Address	Text		✗
▼	sanction_birth_date_1_v	Birth Date	Date (no time)		✗
▼	sanction_birth_date_2_v	Birth Date	Date (no time)		✗
▼	sanction_birth_date_3_v	Birth Date	Date (no time)		✗
▼	sanction_entity_type_1_v	Entity Type	Text		✗
▼	sanction_entity_type_2_v	Entity Type	Text		✗
▼	sanction_entity_type_3_v	Entity Type	Text		✗

4. To enable the field, in the **Enabled?** column, select the red "x" icon. The icon becomes a green **check mark** icon to indicate that the field is now enabled.



The field displays on the HCP or HCO profile page. Each sanction field is categorized into Sanction 1, Sanction 2, or Sanction 3. A section for each group is created, for example, **OIG LEIE Sanction 1**. The sanction field that you enable is placed into the respective group.

▼ **OIG LEIE Sanction 1**

Birth Date (Sanction 1) No Value **Entity Type (Sanction 1)** No Value

Address (Sanction 1) No Value

▼ **OIG LEIE Sanction 2**

Address (Sanction 2) No Value

API

The following updates have been introduced for Network APIs in this release.

Reference Data API

The Retrieve Reference Data Types and Retrieve Reference Data Type Details metadata API are updated with the following enhancements:

- The response HTTP header includes *Last-Modified* to indicate the date when the list of codes was last changed.
- Supports the HTTP request header *If-Modified-Since* to check if the list of codes was modified since the specified date. The HTTP response contains the status code of 304 Not Modified if the content is unchanged.

See https://www.w3.org/Protocols/HTTP/HTRQ_Headers.html#if-modified-since for valid date formats.

SEARCH API

The Search API is updated to include the following new parameters:

- `filterByLocation` (optional) - Search results are filtered by their proximity to the specified location. Results outside the specified distance are excluded.

The parameter is a comma separated list of the following fields:

- **latitude**: The latitude of the central point of a circle or the top left corner of a bounding box.
- **longitude**: The longitude of the central point of a circle or the top left corner of a bounding box.
- **distance**: The length and unit of a radius of a circle or half the length of each side of a square when using a central point. Valid distance units are km (kilometers), m (meters), mi (miles), yd (yards), ft (feet). Can be blank for a bounding box with corners specified.
- **bottomRightLatitude**: The latitude of bottom right corner of a bounding box.



- **bottomRightLongitude:** The longitude of bottom right corner of a bounding box.
- **filterType:** Filter by DISTANCE (default) when specifying the central point of a circle or square, or filter by BOUNDING_BOX when specifying two corners of a bounding box.

Examples

- Find records in a circle with center at 40.7,-74 and a radius of 1km.

```
GET
https://my.veevanetwork.com/api/v10.0/search?q=*&filterByLocation=40.7,-74,1km
```

- Find records in a circle with center at 40.7,-74 and a radius of 5km.

```
GET
https://my.veevanetwork.com/api/v10.0/search?q=*&sortByLocation=40.7,-74&filterByLocation=40.7,-74,5km,,,DISTANCE
```

- Find records in a box with center at 40.7,-74 and a distance of 5km from center to each edge.

```
GET
https://my.veevanetwork.com/api/v10.0/search?q=*&sortByLocation=40.7,-74&filterByLocation=40.7,-74,5km,,,BOUNDING_BOX
```

- Find records in a box with top left corner at 41.7,-75 and bottom right corner at 40.5,-74.

```
GET
https://my.veevanetwork.com/api/v10.0/search?q=*&filterByLocation=41.7,-75,,,40.5,-74,BOUNDING_BOX
```

- **sortByLocation (optional):** Search results are sorted by their proximity to the specified location. The parameter is a geo coordinate pair in the form latitude,longitude (for example 38.889931,-77.009003). Sort by location cannot be combined with sort by other attributes.

Response

geo_distance__u: A distance field. When **sortByLocation** is submitted, the addresses in the results return the distance in kilometers from the specified location.

SYSTEM SETTINGS API

The `system settings` API enables you to access API settings from Network.

This API uses the `GET` HTTP method and is available in Release 8 and later.



Retrieve System Setting

Syntax

```
https://<DNS>/api/<version>/systemSettings/<settingKey>
```

where:

- *DNS* is the URL for your API service
- *version* is the API version
- *settingKey* is the name of the setting you want to retrieve the value for

Parameters

none

Sample request

```
GET
https://my.network.com/api/v9.0/systemSettings/api.search.geolocation.countries
```

Response

`responseStatus`: The status of the response from Network.

`configurationValue`: The value for the setting.

Sample response

```
{ "responseStatus": "SUCCESS", "configurationValue": "US,FR" }
```

CHANGE REQUEST API

The following updates have been added to the `change_request` API for version 10 to support the DCR Queue feature. Earlier versions of these API are not affected by these changes.

Batch Retrieve Change Request API

The following changes have been added to this API.

- `status__v` response:
 - **CHANGE_INQUEUE** - change request was received but cannot be processed until the parent pending review task is completed.
- Displays all of parent task IDs for the change request



- *In Queue* change requests and pending review change requests can have multiple parent tasks

Retrieve Change Request

The following changes have been added to this API.

- `status__v` response: **CHANGE_INQUEUE** - change request was received but cannot be processed until the parent pending review task is completed.
- All parent task IDs display for the change request
- *In Queue* change requests and pending review change requests can have multiple parent tasks

Batch Update

This API is updated to enable API users to update *In Queue* tasks.

Update change request API

This API is updated to enable API users to update *In Queue* tasks.

Batch Process API

The following changes have been added to this API:

- Batch Process will process pending review tasks and its *In Queue* tasks that are updated through the Update API.
- Users should not submit *In Queue* tasks. If a user submits *In Queue* tasks, an error message (Operation not allowed) occurs.

Search Change Request API

The following changes have been added to this API.

- `status__v` response: **CHANGE_INQUEUE** - change request was received but cannot be processed until the parent pending review task is completed.
- `task_state` attribute: **INQUEUE** - users can search change requests that are *In Queue*.