



# **Veeva** Network

Veeva Network 17R1.0.1 Release Notes

April 2017



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## What's new

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The following key enhancements have been introduced in Veeva Network since 10.5.2:

### NETWORK RELEASE

- **Name change** - All Veeva product lines are moving to a unified and consistent release naming scheme for major releases.

### MULTIPLE MASTER

- **DCR routing** - Network supports DCR routing for multiple masters in the same country.

### DCR ROUTING

- **Third party masters** - New HCP/HCO Type options have been added for third party master configurations.

### DATA MAINTENANCE

- **Data deduplication** - Administrators and data managers can run jobs to identify and merge duplicate records in their Network instance.
- **Child inactivation** - Administrators and data managers can run jobs to find and inactivate child objects on inactive HCO and HCP records.
- **Reporting** - Job summary reports are available for data maintenance jobs.

### NETWORK HOME

- **Customized dashboard** - Administrators and data managers can personalize their dashboard with information widgets.

### PROFILES

- **Child affiliations** - Active and inactive child affiliations can be easily identified on HCO profiles.

### CANDIDATE RECORDS

- **Stewarding** - Data stewards can apply and promote candidate records at the same time.

### VEEVA OPENDATA

- **Available subscriptions** - Fields can be enabled so that users can load and view Geo Subdivision and Club Inter Pharmaceutique (CIP) data that are available in some European countries.



## NETWORK EXPLORER

- **Edit mode** - Edit mode buttons have been enhanced for more visibility.

## MATCH

- **Match analysis log** - Fields with multiple entries now use a tilde (~) instead of a carriage return.

## GENERAL UPDATES

- **Date selections** - Users can now easily choose the current date and time on date pickers.

## API

- **New version** - Network API version 11.0 is now available.
- **Subscription jobs** - New API is added for creating and canceling subscription jobs.

## 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 10.5.1 and 10.5.2:**

## DATA VALIDATION RULES

- **Add user types** - Data validation rules can now apply to standard users and administrators.

## SUBSCRIPTIONS

- **Scheduling jobs** - Administrators and data managers can define multiple schedules for subscription jobs.

## PRIMARY ADDRESS AND PRIMARY AFFILIATION

- **Automatically defining** - The behavior for automatically determining primary address and primary affiliation is enhanced to cover many scenarios.

## JOB DETAILS

- **Rejected records** - The Job Summary Results table is updated to differentiate the records that are rejected and records that are not loaded.
- **Additional information** - New information is added to the Job Details page for source subscriptions.



## SUSPECT MATCH

- **Assignment of tasks** - After a suspect match is processed, resulting tasks are automatically assigned to the same data steward.

## SEARCH

- **Enhancements** - Search results consider custom key status and child object state. Child object quick filters are nested and applied to the selected parent affiliation.

## DATA QUALITY REPORTS

- **Canadian data** - Predefined templates for test cases and entity groups are available for instances that have Canadian data.

## CONFIGURATION MANAGEMENT

- **Exporting configurations** - Administrators can export specific configuration records for an environment for comparison purposes.
- **Validating configurations** - Exports are validated to ensure that any dependencies are also exported with the selected configuration records.

## VEEVA OPENDATA SUBSCRIPTIONS

- **Filter Parent HCOs** - Users can filter the Parent HCOs that are automatically downloaded during data change requests or downloading or syncing with Veeva OpenData.
- **Changes to Parent HCOs** - When ParentHCO relationships change, users can choose to download Parent HCOs that do not meet the filter criteria.

## CHANGE REQUESTS

- **Profile link** - Add requests now contain a link to the profile for an unverified record.
- **Request summary** - The Request Summary pane now remains fixed to the top of the browser window as data stewards scroll through the DCR page.
- **Primary address or affiliation** - Data change requests are successfully processed if they include inactive primary objects.

## MATCH

- **Chinese match rules** - Match rules for default data groups and classifiers have been updated to improve match performance.

## REFERENCE DATA

- **Reference aliases** - Missing aliases no longer cause records to fail during subscription jobs.



## SEARCH

- **Street view** - Users can open an entity's address in street view directly from the business card in the search map.

## PROFILE

- **Street view** - Users can open an entity's address in street view directly from the business card in the profile.

## CUSTOM KEYS

- **Reject duplicate keys** - The option to prevent duplicate custom keys from loading during a source subscription is available in all Network instances.



## About these Release Notes

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These Release Notes describe all features included in Veeva Network 17R1.0.1.

## Browser requirements

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The following are the minimum browser requirements:

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

Veeva Network is not supported on mobile devices.

## Release name change

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This release of Veeva Network is called 17R1.0.

Veeva is moving to a unified and consistent release naming scheme for major releases across all Veeva product lines. The new release names will be the last two digits of the year (17), the letter “R”, and then sequence numbers for releases within the year. This change makes it easier for customers using Veeva’s pre-integrated solutions to understand related versions across product lines.

## Multiple masters

---

Network now supports DCR routing for multiple master data providers within the same country. Master data providers can include Veeva OpenData and third party data providers. This feature enables customers to subscribe to master data providers for different types of data. For example, if you subscribe to a master data provider for HCPs and HCOs but the provider does not have pharmacy data, you can now subscribe to an additional provider for that pharmacy data.

Typical Network instances will only need to use one master in each country. Multiple master support addresses special markets and use cases. To use this feature, contact Veeva Support to enable it for your Network instance. After it is enabled for your instance, it cannot be turned off.

### SUPPORTING MULTIPLE MASTERS BY COUNTRY

A Network instance with multiple masters will typically have two masters:

- Veeva OpenData + Third party master data provider
- or
- Third party master data provider A + Third party master data provider B



Data from different master providers are always separated. The DCR process is supported for multiple masters so that all DCRs are routed according to data ownership.

When multiple master support is enabled in your Network instance, all master data is defined by country and by HCO/HCP types. The country and the HCO/HCP types must be mutually exclusive for each master because Network uses that information to understand which master owns the data. For example, if a master data provider uses the `Prescriber` HCP type for China, no other master data provider can use that HCP type in China. Network will know to route any DCRs for the `Prescriber` HCP type in China to that master data provider.

The country and HCO/HCP types are defined when you create a master source system.

**New System** Cancel Save

**Details**

Name:

Description:

Third Party Master:  Yes  No

Unmerge Ability:

**DCR Routing Criteria**

Countries:

HCP Type:

HCO Type:

## BEFORE YOU BEGIN

Network uses the country and HCO/HCP type information to understand which master owns what data. This ensures that DCRs are routed to the correct data stewards.

To prepare your Network instance to support multiple master data providers, complete these tasks before you enable the feature:

- **Identify potential overlaps between master data providers**

When Network supports multiple masters, HCO/HCP types must be mutually exclusive for the same country. Existing Network instances typically already contain data from a master source and might have customer-owned data also. Before adding a second master source to a country, use Network reports to analyze the existing data and see what HCO/HCP types are already used by the existing master. If there are HCO/HCP types that will overlap between two masters in one country, the issue must be fixed before you can create a second master source. There is no conflict if customer-owned records use the HCO/HCP types in that country because customer-owned records can be matched and merged with master records.

This analysis includes records in the Veeva OpenData subscription working set. Review the Network Entity IDs (VIDs) that you subscribe to and ensure that none of the records use the HCO/HCP types that will be provided by a third party master.



If existing records in your Network instance are found to be using the same HCO/HCP types that will be provided by the new master source, to avoid overlaps, inactivate or adjust the HCO/HCP type before you load master data from the second source.

- **Identify record ownership using custom keys**

The master source that owns and manages a record is defined using the custom keys. For example, records owned and managed by Veeva OpenData have a custom key source called `MASTER__v`. If you have any existing third party data in your Network instance, ensure that those custom keys are properly defined and loaded so that the owner of these records can be clearly identified using the custom key source type. This will help you to analyze data using Network reports.

- **Map HCO and HCP types**

Master data providers might have different definitions and granularity of HCO/HCP types. Before enabling multiple master support, it's important to understand how the new master data provider defines their HCO/HCP types. If the HCO/HCP types owned by a third party master are identified differently than the types in the Network data model, you must map them before loading the new master data into Network.

## ANALYZE EXISTING DATA USING NETWORK REPORTS

To review the existing data in your Network instance before you enable the multiple master feature, use the advanced ad hoc queries in Network reports (**Reports > Ad Hoc Queries**). These reports will identify the HCO/HCP types already being used in your Network instance for a specific country.

### *HCO/HCP types used for a specified country*

To see what HCO/HCP types are currently used in your Network instance, use the following queries:

#### **HCO query**

```
SELECT
    hco.hco_type__v,
    count(*) as count
FROM
    hco
WHERE hco.hco_status__v = 'A'
    AND hco.primary_country__v = 'CN'
GROUP BY hco.hco_type__v
ORDER BY count DESC
```



**Results** - The query results for this example will display active records using HCO types in China.

### Ad Hoc Queries

Database Last Updated: Feb 26, 2017, 3:37pm Next Update: Mar 3, 2017, 10:37am Save Run

Record Details Counts & Summaries **Advanced**

```

1 SELECT
2   hco.hco_type__v,
3   COUNT (*) AS COUNT
4 FROM
5   hco
6 WHERE
7   hco.hco_status__v = 'A'
8   AND hco.primary_country__v = 'US'
9 GROUP BY
10  hco.hco_type__v
11 ORDER BY
12  COUNT DESC

```

Record State: 0

**Results (61 records)** Download Refresh

Table Chart

HCO TYPE	COUNT
Organization, Group Practice	4952
Organization, Clinic	2675
Organization, Hospital	1426
Organization, Group at Hospital	1345
Organization, CMS Teaching Hospital	726
Pharmacy, Retail	552
Organization, Dentistry Group	500
Organization, Nursing Home / Long Term Care	314
Organization, Clinic at Hospital	285
Organization, Other Org	261
Organization, Community MH Center	258
Organization, Veterinary Group	151
Organization, Dept at Hospital	137
Organization, Admin Only	131
Optical Center	111

### HCP query

```

SELECT
    hcp.hcp_type__v,
    count(*) as count
FROM
    hcp
WHERE hcp.hcp_status__v = 'A'
      AND hcp.primary_country__v = 'CN'
GROUP BY hcp.hcp_type__v
ORDER BY count DESC

```

### *HCO/HCP types that are being used by master sources*

To see which master sources are using HCO/HCP types, use the following queries that join the HCO/HCP tables with the custom key table:



### HCP query

```
SELECT
    hcp.hcp_type__v,
    customkey.custom_key_source_type__v,
    count(*) as count
FROM
    hcp INNER JOIN customkey
        ON hcp.vid__v = customkey.custom_key_entity_id__v
WHERE hcp.hcp_status__v = 'A'
    AND hcp.primary_country__v = 'CN'
    AND customkey.custom_key_status__v = 'A'
    AND customkey.custom_key_source_type__v in
('MASTER__v', 'Third_party_master')
GROUP BY hcp.hcp_type__v, customkey.custom_key_source_type__v
ORDER BY hcp.hcp_type__v, customkey.custom_key_source_type__v
```

Note that in the query, MASTER\_\_v is the Veeva OpenData custom key source. Replace Third\_party\_master with the custom key source that you defined for your third party master data.

**Results** - The query results for this example will display the HCP types used in China for the Veeva OpenData subscription and the specified third party master.

The screenshot shows the 'Ad Hoc Queries' interface. At the top, it says 'Reports > Ad Hoc Queries'. Below that, 'Ad Hoc Queries' is the main title, with 'Database Last Updated: Mar 7, 2017, 10:37am' and 'Next Update: Mar 7, 2017, 2:37pm' on the left, and 'Save Run' buttons on the right. There are three tabs: 'Record Details', 'Counts & Summaries', and 'Advanced'. The 'Advanced' tab is selected, showing the SQL query. Below the query, there are 'Results (5 records)' and a table view. The table has columns for 'HCP TYPE', 'SOURCE', and 'COUNT'. The data rows are: Business Professional (Third\_party\_master, 359), Doctor (MASTER\_\_v, 14706), Non-Prescribing Health Care Professional (MASTER\_\_v, 40), Prescriber (MASTER\_\_v, 97), and Technician (MASTER\_\_v, 36). At the bottom, it says 'Displaying 1 to 5 of 5' and 'Show 25 1 of 1 <>'.



## HCO query

```

SELECT
    hco.hco_type__v,
    customkey.custom_key_source_type__v,
    count(*) as count
FROM
    hco INNER JOIN customkey
        ON hco.vid__v = customkey.custom_key_entity_id__v
WHERE hco.hco_status__v = 'A'
    AND hco.primary_country__v = 'CN'
    AND customkey.custom_key_status__v = 'A'
    AND customkey.custom_key_source_type__v in
('MASTER__v', 'Third_party_master')
GROUP BY hco.hco_type__v, customkey.custom_key_source_type__v
ORDER BY hco.hco_type__v, customkey.custom_key_source_type__v

```

Note that in the query, `MASTER__v` is the Veeva OpenData custom key source. Replace `Third_party_master` with the custom key source that you defined for your third party master data.

## ADDING A THIRD PARTY MASTER SYSTEM

When you are satisfied that your existing master configuration (Veeva OpenData or a third party system) does not use the HCO/HCP types in the same country as a new third party master data provider, add the new system.

To add a third party master system to your Network instance:

1. In the Admin console, click **System Interfaces > Systems**.
2. Click **Add System**.
3. Type a **Name** and **Description** for the new system.
4. Beside **Third Party Master**, choose **Yes**.
5. In the **DCR Routing Criteria** section, choose the countries and HCO/HCP types to apply to this third party master system. Network uses these settings to route DCRs appropriately.
  - **Countries** - Select the countries for the data.
  - **HCP/HCO Type** - Select the types that will be used by this system. The following choices are available for HCPs and HCOs:
    - **All HCO Types** or **All HCP Types** - All HCP/HCO DCRs for the selected country will be sent to this third party for stewarding.
    - **None** - No HCP/HCO DCRs for the selected country will be sent to this third party for stewarding.
    - **No Value** - Any HCP or HCO DCRs submitted that do not specify a type will be routed to this third party for stewarding.



- Select individual types; for example, **Business Professional (HCP)**, **Pharmacy**, **Retail (HCO)**. HCP/HCO DCRs that specify these types are routed to this third party for stewarding.

6. **Save** your changes.

### New System Cancel Save

**Details**

Name

Description

Third Party Master  Yes  No

Unmerge Ability

**DCR Routing Criteria**

Countries

HCP Type

HCO Type

## CONFIGURING VEEVA OPENDATA SUBSCRIPTIONS

If you have an existing Veeva OpenData subscription or are adding a subscription, some settings must be configured when you have multiple masters for the same country.

To prepare your Veeva OpenData subscription for multiple master support:

1. In the Admin console, click **System Interfaces > Veeva OpenData Subscriptions**.
2. Select a country where you have a subscription enabled.



3. *Optional.* In the **HCP** section, select **Subscribe to additional Veeva OpenData HCP records**. This option is for downloading HCP records in addition to the records that you have defined in your Working Set. Select the **Types** of HCPs that you want to download. The HCP Types cannot be the same types used by a third party master for the same country.

**Note:** Do not list additional HCP records by **Specialty**. Downloading additional records with a specific specialty might have a **Type** that is not owned and provided by Veeva OpenData. If the **Type** is owned by a third party master source, it might result in duplicate records in your Network and CRM instance from two different master sources.

4. In the HCO section, select **Filter Parent HCOs during Ad Hoc Download and Data Change Requests**. This ensures that only the parent HCOs of the **Types** that you identify are downloaded with records that are added to your Network instance. All HCO types used by third party master sources are filtered and will not be downloaded.
5. Select all of the **Types** that are subscribed to in Veeva OpenData.

**Tip:** Use Network reports to see a list of all of the HCO types used in Veeva OpenData records in your Network instance.

6. *Optional.* To subscribe to HCO records in addition to the records defined in the working set, select **Subscribe to additional Veeva OpenData HCO records** and list the **Types**.

**Note:** Do not list additional records by **Specialty**. Downloading additional records with a specific specialty might have a **Type** that is not owned and provided by Veeva OpenData. If the Type is owned by a third party master source, it might result in duplicate records in your Network and CRM instance from two different master sources.



## Veeva OpenData Subscription (China)

Ad Hoc Download

Start Job

Cancel

Save

### ▼ Veeva OpenData Subscription Details

The Working Set is a file that contains a list of Network VIDs. Only records with the VIDs will be downloaded to your instance.

**Working Set FTP Path** inbound/workingset\_\_v/CN/workingset.csv

Subscribe to additional HCP records that match your defined Specialties and Types. These records will be downloaded during the Veeva OpenData scheduled job.

**HCP**  Subscribe to additional Veeva OpenData HCP records

#### Specialties

Select a specialty

AND

#### Types

Prescriber X Animal Health X Business Professional X Dentist X Doctor X  
Non-Prescribing Health Care Professional X Nurse X Resident X Student X

Subscribe to additional HCO records that match your defined Specialties and Types. These records will be downloaded during the Veeva OpenData scheduled job. You can use the same Specialties and Types to filter the Parent HCOs downloaded during Ad Hoc Downloads and Data Change Requests.

**HCO**  Subscribe to additional Veeva OpenData HCO records

Filter Parent HCOs during Ad Hoc Download and Data Change Requests ⓘ

#### Specialties

Select a specialty

AND

#### Types

Administrative Service X Ancillary Services, Child Care & Nursery Centre X  
Ancillary Services, Emergency Rescue and Patient Transfer X  
Ancillary Services, Medical and Diagnostic Laboratories X Ancillary Services, Other Providers X  
Area Team X Association X Blood Transfusion Centers X Children's Hospital X  
Clinical Commissioning Group X Commercial & Independent Provider X Commissioning Region X  
Commissioning Support Unit X Committee X Dialysis & Infusion Centers X  
Dialysis & Infusion Centers, Corporate Office X  
Dialysis & Infusion Centers, Hospital-based Dialysis/Infusion X Dialysis & Infusion Centers, Other X  
Distributors, General X District X Education Establishment X GP Federation/Network X  
Health and Wellbeing Board X Health Authority/Board X  
Health Care System Administration, Government Health Administration X

The HCO/HCP types defined in the Veeva OpenData subscription filter the Parent HCOs downloaded with HCOs or HCPs when **Search Against OpenData** is enabled for Network Search and for downloading records. When records are downloaded, up to five levels of parents are also downloaded. Any parent records that are owned by third party masters are not downloaded.

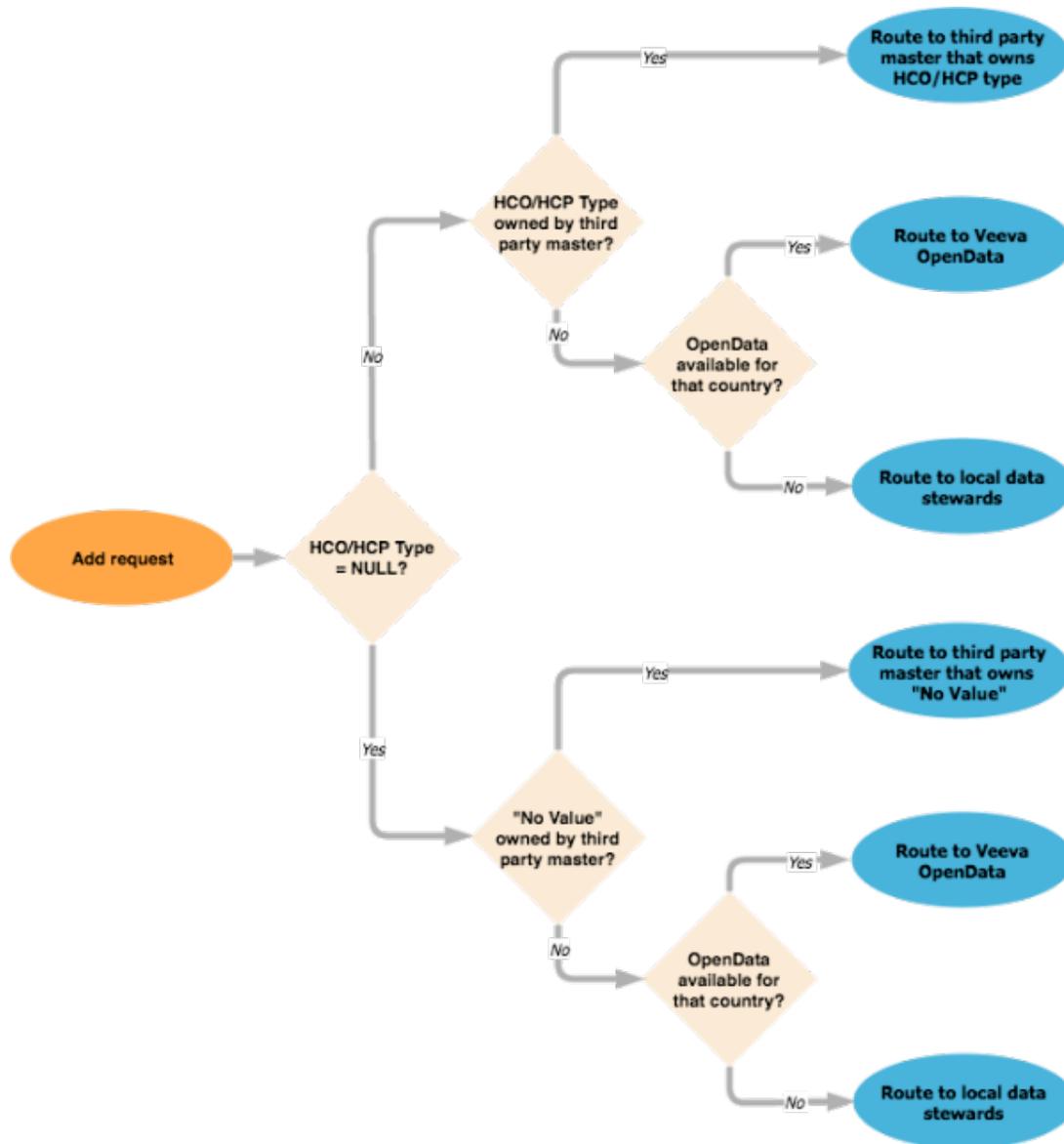


## DCR ROUTING

When your Network instance is enabled for multiple masters, Network uses the HCO/HCP type and country to know where to route add and change requests.

When the DCR contains the HCO or HCP type, Network identifies the owner using the definitions in the Veeva OpenData subscription or third party master system configuration.

If there is no HCO or HCP type defined (Null), Network uses business logic to know where to route the DCR for stewarding.



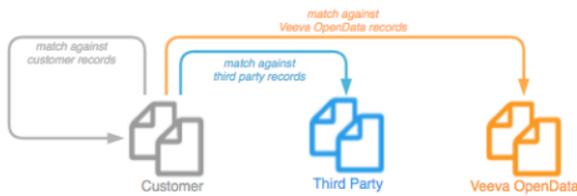


### Routing DCRs for Parent HCOs

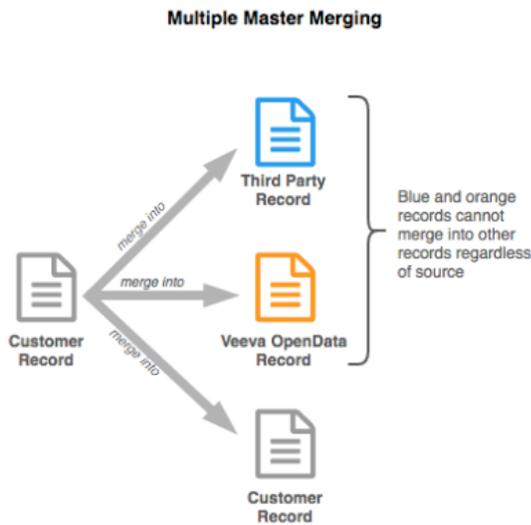
When add requests are submitted for ParentHCO objects, the DCR is routed to the master data stewards only if the child and parent entity have the same owner; otherwise, the DCR is routed to local data stewards for review. Similarly, if the child entity (owned by Veeva OpenData) is changed at the same time that a ParentHCO is added (parent entity is owned by a third party master), the change request and add request are routed to different data stewards. The change request is routed to Veeva OpenData for stewarding and the ParentHCO is routed to local data stewards.

### MATCHING AND MERGING CONSIDERATIONS

Master data is always separate, so Veeva OpenData or third party master data cannot be matched or merged. Network checks the owner of the record to ensure that only gray records are matched and merged with master records.



The following diagram illustrates the only supported scenarios for merging records:



### SOURCE SUBSCRIPTION CONSIDERATIONS

When you are loading subscriptions for third party master systems (**System Interfaces > Source Subscriptions**), the options for **Match against OpenData** and **Source Deduplication** are not available. The data from third party master providers cannot be matched with Veeva OpenData. Master source data is always separated. Local (gray) records can continue to be matched and be source deduplicated with Veeva OpenData.



## DATA MODEL CONSIDERATIONS

When a field is mastered by a third party system for a country, the country is identified in the **Managed by Customer** section on the Edit Field page. The **Managed by a Master Data Source** section identifies countries where the field is mastered by Veeva OpenData. For example, if the `first_name__v` field is mastered by both Veeva OpenData and a third party system for Andorra, Andorra is listed in both sections.

When fields are mastered by Veeva OpenData and third party systems for a country, the country cannot be removed from the Edit Field page. An error occurs if users attempt to remove a third party mastered country from the **Managed by Customer** section.

## MAINTAINING MULTIPLE MASTERS IN YOUR NETWORK INSTANCE

Subscribing to data from multiple masters can include some risk for having duplicate records in your instance from different sources. For more information about recommended monitoring and avoiding overlapping ownership of records, see the *Veeva Network Multiple Master Technical Brief*.



## DCR routing

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### THIRD PARTY MASTER SYSTEMS

In the third party master system configuration, new values have been added for the DCR routing criteria for **HCP Type** and **HCO Type**. Administrators and data managers can now choose the following values to help Network route DCRs:

- **No Value** - Any DCRs that are submitted that do not specify a **HCP Type** or **HCO Type** are routed to this third party for stewarding.
- **None** - No HCP/HCO DCRs for the selected country will be sent to this third party master for stewarding.

The screenshot shows a configuration form for 'DCR Routing Criteria'. It includes a 'Countries' dropdown menu with 'Italy' selected. Below it are 'HCP Type' and 'HCO Type' dropdown menus. The 'HCO Type' dropdown is open, showing a list of options: 'All HCO Types', 'None', 'No Value', 'A clinical study', 'A clinical study sponsor', and 'Administration Board'.

If the DCR routing criteria for existing third party master systems is **All HCP Types** or **All HCO Types**, the **No Value** option is automatically added during the upgrade to Network 17R1. This ensures that all DCRs are routed to the third party for stewarding.

The screenshot shows a configuration form for 'Third Party Master'. It includes a 'Third Party Master' radio button group with 'Yes' selected. Below it is an 'Unmerge Ability' dropdown menu with 'Do not unmerge' selected. Below that is a 'DCR Routing Criteria' section with a 'Countries' dropdown menu showing 'Australia'. The 'HCP Type' and 'HCO Type' dropdown menus are both open, showing 'All HCP Types' and 'No Value' selected for HCP Type, and 'All HCO Types' and 'No Value' selected for HCO Type.

## Data maintenance

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The System Interfaces menu in the Admin console now contains data maintenance jobs.

### DATA DEDUPLICATION

Administrators and data managers can preserve data quality by creating data maintenance jobs to identify duplicate records in their Network instance. Duplicate records exist because of poor match rules, DCR processing errors, or records are added without searching for existing records first. Use data



deduplication jobs to compare specific records in your Network instance against all other records in your instance.

This feature is not enabled by default. Contact Veeva Support to enable this feature in your Network instance and to provide assistance.

### *Finding duplicate records*

Similar to source subscription jobs, data deduplication jobs use data groups to narrow the number of records being compared and match rules to determine if records are the same or not. Match logs contain a summary of the records that were merged or suspect matched during the job. Comparisons are done at the entity level. Existing merge rules are used for child objects when records are merged.

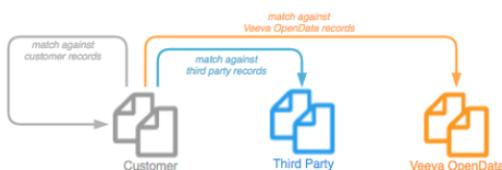
When the feature is enabled in your instance, all previous unmerges that have occurred in the instance are tracked and can be ignored from comparisons when you create a data deduplication job. However, rejected suspect match tasks and duplicates are tracked only from the feature implementation and onwards.

The jobs can be thoroughly tested before you commit to merging any records.

### *Considerations for data deduplication jobs*

Before you create a job, review the following considerations:

- **Match types** - It is a best practice to begin using data deduplication with ASK matches only. After you have tested the job and are confident in your match rules, you can introduce ACT matches.
- **Job size** - Jobs can take some time to run, so prioritize your data and work with small, logical sets of data for each data deduplication job.
- **Applicable records** - Only valid customer-owned (gray) records from the specified Veeva IDs (VIDs) are compared. The gray records are compared against all of the records in the instance, which includes Veeva OpenData records, third party mastered records and other customer-owned records.



Valid records for a country where match rules are not defined are skipped because the data deduplication process cannot match those records.

The following record types are excluded from the comparison: invalid, under review, externally mastered (Veeva OpenData or third party), and candidate records.

- **Match against Master** - Customer owned-records are compared against all records that exist in your Network instance. Records are not compared to records in Veeva OpenData.



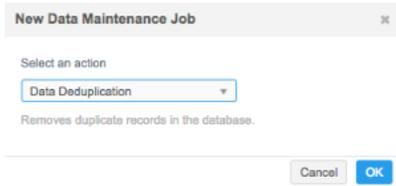
### Create a data deduplication job

To create a job to find duplicate records in your Network instance:

1. In the Admin console, click **System Interfaces > Data Maintenance**.
2. On the Data Maintenance page, click **Add Maintenance Job**.

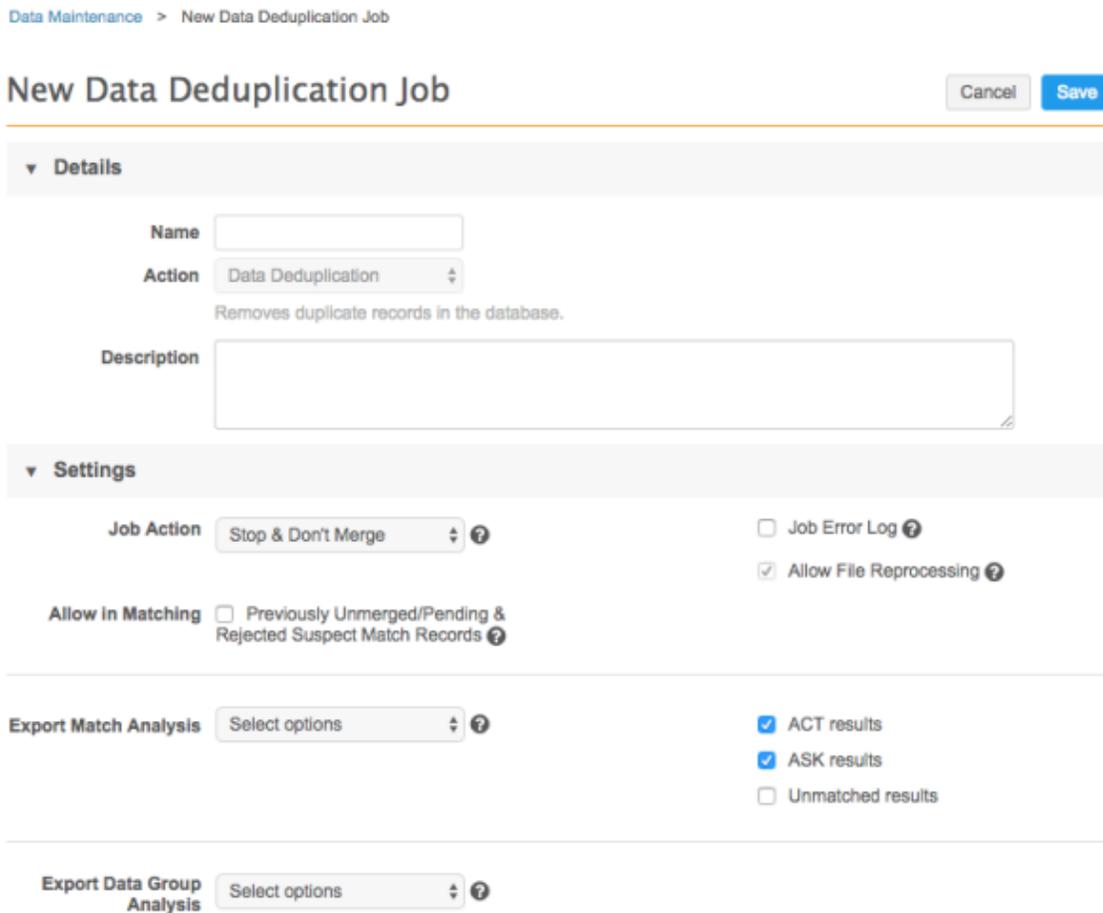
A **New Data Maintenance Job** dialog displays.

3. In the **Action** list, select **Data Deduplication** and click **OK**.



The dialog box titled "New Data Maintenance Job" contains a dropdown menu labeled "Select an action" with "Data Deduplication" selected. Below the dropdown is the text "Removes duplicate records in the database." At the bottom right are "Cancel" and "OK" buttons.

4. Type a **Name** and **Description** for this job that reflects the data that you are analyzing.



The configuration page for a "New Data Deduplication Job" includes a breadcrumb "Data Maintenance > New Data Deduplication Job" and "Cancel" and "Save" buttons. The "Details" section has fields for "Name", "Action" (set to "Data Deduplication"), and "Description". The "Settings" section includes "Job Action" (set to "Stop & Don't Merge"), "Allow in Matching" (with a checkbox for "Previously Unmerged/Pending & Rejected Suspect Match Records"), "Export Match Analysis" (with a dropdown for "Select options"), and "Export Data Group Analysis" (with a dropdown for "Select options"). Checkboxes for "Job Error Log", "Allow File Reprocessing", "ACT results", "ASK results", and "Unmatched results" are also present.



5. In the **Settings** section, there are several options to consider:
  - **Job Action** - Select how you want Network to process the job:
    - **Stop and Don't Merge** - Stop the job after the match stage and do not merge records. This is selected by default. Use this option to test the job and ensure that overmatching is not occurring before you apply the updates.
    - **Apply Updates & Merge**- ACT (strong) matches will be automatically processed. Use when you are confident that the job is matching appropriately.
    - **Review before Merge** - Pause the job after the match stage and before the records are merged so that you can review the match log for changes. When you are satisfied with the outcome, you can resume the job so the records merge. When you select this option, an email is sent to you when the job pauses so you can review the results. You can resume the paused job from the Job Details page.
  - **Job Error Log** - Produce a job error log for this maintenance job. This should be used during the testing process only because it contributes to length of the job's run time.
  - **Allow File Reprocessing** - Enabled by default and cannot be changed. Data deduplication jobs can run the same file, from the FTP server, multiple times.
  - **Allow in Matching: Previously Unmerged/Pending & Rejected Suspect Match Records**  
Select this option if you want to include records that have been previously rejected as a suspect match or have been unmerged in the past. This also includes records that are already in a pending suspect match task in the inbox. For initial testing, do not select this option.
  - **Export Match Analysis** - Select to export match logs for **HCOs** and **HCPs**. This is helpful for analyzing the results while you are testing the effectiveness of the Data Deduplication job.
  - **Result Type** - Filter the exported match log by result type: **ACT**, **ASK**, or **Unmatched results**. **Unmatched results** is not selected by default because that information is not relevant for this job.
  - **Export Data Group Analysis** - Select to export data group logs for **HCOs** and **HCPs**. This is helpful for analyzing the results while you are testing the effectiveness of the Data Deduplication job.
6. In the **Schedule** section, choose to run the subscription manually or on a scheduled basis. If you select **Manual**, the subscription only runs when you click the **Start Job** button on the subscription page. During testing, select **Manual**; scheduled jobs should not be paused.
7. In the **HCP Subset Options** and **HCO Subset Options** sections, identify the records that you want to compare.
  - **No Records** - Select to indicate that no HCPs will be compared during the job.
  - **FTP** - Create a file with a list of Veeva IDs (VIDs) and add it to an FTP site. Specify the FTP directory where Network can retrieve the file.

Requirements for the.csv file:

- One column only that contains the list of Veeva IDs (VIDs)
- Column header is optional and must not have any other characters around the text
- VIDs must be listed in separate rows
- Double quotation marks ("" ) around VIDs are permitted
- No extra characters; for example, commas (,) after VIDs



- File name must be exactly the same format as it is on the FTP site; capitalization matters (for example, VIDS . csv is not the same as VIDs . csv)

A
242979800367498243
242979800367498245
242979800367498246
242979800367498247
242979800375886848
242979800384275456
242979802120717313
242979802120717316
242979802137494528
242979802506593281
242979802514981888
242979802682754048
242979803068630018
242979803118961668
242979803236402179

- You can use one file to contain both HCOs and HCPs and identify it in either the **HCP Subset Options** or the **HCO Subset Options** section.
- If you use separate files, the file names can be different, but the FTP path must be the same.

**▼ HCP Subset Options**

No Records

FTP

/

Use Filters

**▼ HCO Subset Options**

No Records

FTP

/

Use Filters

- **Use Filters** - Use the filters in **Basic Mode** or create a SQL query in **Advanced Mode** to identify the records that you want to compare during the job. To use filters, Network Reporting must be available.

**▼ HCP Subset Options**

No Records

FTP

Use Filters

Database Last Updated: Mar 5, 2017, 5:23pm Next Update: Mar 6, 2017, 2:20am

FIELD	CONDITION	VALUE	AND/OR
HCP Type	Equals	Prescriber	

[+ Add Filter](#)



An advanced SQL query must return a list of VIDs only. The SQL query can contain both HCP and HCO records. Note that even if **No Records** has been selected for HCPs or HCOs, if your query returns both HCO and HCP records, they will be included in the job.



**Note:** If a filter defines a child object (Address, License, Parent HCO), the owning HCO or HCP is identified and that VID is used in the matching process. All attributes and child objects of a record are used to identify possible duplicates.

The reporting database identifies the records that are selected in Basic or Advanced queries. You might find a discrepancy between what reports or filters indicate versus the actual status of records in the instance. When you are analyzing the remaining duplicate records, take note of when the reporting database was last updated for your instance.

8. In the **Match Configuration** section, define match rules and data groups by country and entity type for this job. If you have records for a country where match rules are not defined, the data deduplication process cannot match those records so the records are skipped.

Data groups restrict the set of records to compare, while the match rules provide detailed rules to compare objects. Data groups should be generic enough to include all possible matches, but cannot include more than 1,000 records.

Network provides default data groups and match rules that can be used or modified for your Network instance. These are the same defaults used by source subscriptions.

9. **Save** your changes.

### **Running a data deduplication job**

To manually run a saved data duplication job, select the name of the job from the list and click **Start Job**.

When the job completes, the **Job History** section displays at the bottom of the job page. There are separate columns for match and merge actions that occurred during the job. If no records were merged during the job, or you chose not to apply merges, data does not display in the merge columns.



ID	START TIME	TYPE	MATCH JOB DURATION	MATCH JOB OUTCOME	MERGE JOB DURATION	MERGE JOB OUTCOME
134	2016-10-13 22:21:00	MANUAL	3 hours	COMPLETE	a minute	COMPLETE
132	2016-10-13 11:28:00	MANUAL	3 hours	COMPLETE		
130	2016-10-12 14:35:00	MANUAL	a few seconds	COMPLETE		
129	2016-10-12 14:33:00	MANUAL	a few seconds	COMPLETE		
128	2016-10-12 14:32:00	MANUAL		FAILED		

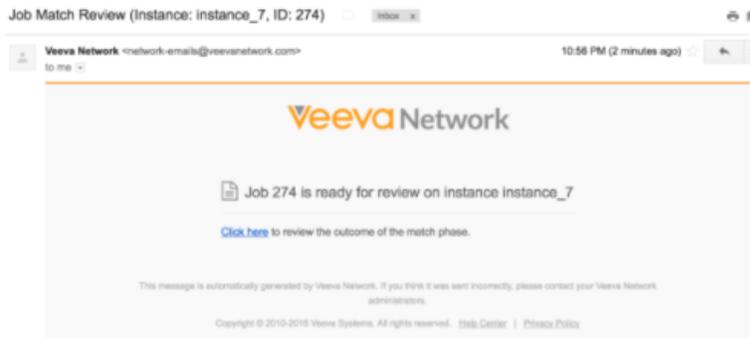
If the server is busy with multiple jobs, the match stage of the job will be suspended until the server is free. This ensures that higher priority data loading jobs are not impacted by this maintenance job. If the match stage of the job suspends, the job status in the Outcomes column in the **Job History** section and the Job Details page will display **Suspended**. The merge stage of the job does not go into suspended mode.

When records merge during a data deduplication job, it is noted in the revision history of the merged record so it is easy to identify the source of the merge.

Now that you've identified the records to compare, run the data deduplication job as many times as necessary until no further duplicates are found for that set of records.

### Pausing jobs

The **Review before Merge** option in job **Settings** section stops a data deduplication job after the match stage. This enables users to review the matches before records are merged. If you ran the job manually, when the job pauses, an email is sent to you so that you know the data is available to review.



Click the link in the email to navigate to the Job Details page.

### Job Details (ID: 274)

Subscription		NewTest	Trigger				
JOB ID	START TIME	CURRENT STAGE	PERCENT COMPLETE	OUTCOME	DURATION		
Match Job	274	2017-02-10 22:57:00	DataMaintenanceValidationStage	40.00%	PAUSED		Resume Job Cancel
Merge Job							



A best practice is to export the match and data group logs so that you have match outcomes to review. Reviewing the logs also confirms to you that the job is performing as expected.

Pausing jobs is not recommended for scheduled jobs. If the data deduplication job was scheduled, the job pauses but an email notification is not sent.

When you are confident that the matches are accurate, you can click **Resume Job** on the Job Details page to complete the job by merging the records. Promptly resuming the job is recommended because the list of records is static and does not consider that those records might have changed since the job initially ran.

If changes are required to the match rules, cancel the job, update the configuration, and run the job again.

Paused jobs will not be canceled during Network upgrades. They will remain in a paused state, waiting for user review.

### Data deduplication job details

When a data deduplication job completes, users can view more details on the job page. Click the job ID in the **Job History** section.

The Job Details page provides summary information for match and merge actions. If the merge stage of the job did not occur, no merge section displays.

**Job Details (ID: 28911)** Cancel Job

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**▼ Overview**

Subscription Test1		Trigger MANUAL				
	JOB ID	START TIME	CURRENT STAGE	PERCENTAGE COMPLETED	OUTCOME	DURATION
Match Job	28111	2016-06-15T15:58:00-04:00	Final Stage	100%	Completed	A few minutes <span style="float: right; border: 1px solid #ccc; padding: 2px 5px;">Cancel</span>
Merge Job	28112	2016-06-15T15:58:00-04:00	Merge Stage	55%	In Progress	<span style="float: right; border: 1px solid #ccc; padding: 2px 5px;">Cancel</span>

**▼ Data Load Summary**

	ROWS READ	ROWS PARSED
HCPs	20	18
HCOs	30	23

**▼ Match Summary**

	NOT MATCHED	ACT MATCHES	ASK MATCHES
HCPs	14	3	1
HCOs	15	5	3

**▼ Job Result Summary**

	TOTAL	ADDED	UPDATED	MERGED
HCPs	1	0	1	0
HCOs	0	0	0	0
Addresses	0	0	0	0
Licenses	0	0	0	0
Relationships	0	0	0	0



**Data Load Summary** - The number of rows that were loaded and how many were processed.

If you used one FTP file for both HCP and HCO VIDs, the count in the **Rows Read** column indicates the number of rows in that file, even if one file contains both HCPs and HCOs. The statistics display in the row (HCP or HCO) that was used to list the file name on the job configuration page. The **Rows Parsed** column displays how many records for that entity were loaded and used. Unrecognized and incorrect VIDS, or extraneous data, is ignored and not included in the **Rows Parsed** column.

**Match Summary** - The number of records that were matched, the match type (either ACT or ASK matches), and how many did not match.

**Merge Summary** - Details about all of the completed merges. If no merges occurred during the job, this section is empty.

**Job Error Log** - Warnings or errors that occurred while the job ran.

*Suspect match considerations*

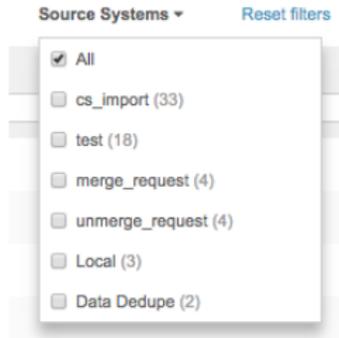
Any ASK match outcomes from the data deduplication job result in suspect match tasks in the Inbox. To minimize the load and work produced for data stewards, a limit of 200 suspect match tasks can be created during each job. If the number of tasks exceeds 200, a warning displays in the **Job Error Log**.

▼ Job Error Log			
EXTERNAL ID	STAGE	RULE	MESSAGE
0	Match	Blocking	Some master records that met the criteria for (hco_type__v=4_81 & is_externally_mastered__v=tru... <a href="#">more</a>
0	Match	Cluster	Some suspect matches were not included in a suspect match task because the limit of 200 records per task was reached. Process the existing tasks and then run the job again. <a href="#">less</a>

After the data steward team has reviewed the 200 suspect match tasks, run the job again until this warning no longer occurs.

To ensure that suspect match tasks can be easily actioned by data stewards, a limit of 20 records can be included in one task. If the number of records included in a task exceeds 20, a warning is logged in the **Job Error Log**. To resolve the warning, run the same job multiple times until this warning no longer occurs.

To help data stewards manage their inbox after a data deduplication job completes, they can filter their inbox for suspect match tasks using the `data_dedup__v` source system.



Records that have previously been rejected in a suspect match task, or records that have been previously unmerged, will not be considered as potential matches again unless the content of the record changes. This ensures that data stewards are not reviewing the same records multiple times. This behavior can be overridden by selecting the **Include in Matching: All previously processed records** option in the Settings section.

A file containing a list of all the rejected pairs is exported after every data deduplication job completes. The file lists all of the record pairs that matched based on the match configuration but were not merged or included in a suspect match task (because the records were previously rejected as matches). The file name follows this format:

`<systemname>-<entitytype>-MATCH-ANALYSIS-<timestamp>-<job id>-REJECTED-PAIRS.csv`

First Vid	Second Vid	Rule Name	Advice	Status
928978090844028959	92917226207891747	Names are similar	ASK	SUSPECT_MATCCH
929172262076088356	929172262071173151	ME is identical	ACT	UNMERGED

If two or more records are already in a pending suspect match task in the inbox, a new suspect match task containing exactly the same group of records will not be created by the new data deduplication job. This behavior can be overridden by selecting the **Allow in Matching: Previously Unmerged/Pending & Rejected Suspect Match Records** option in the Settings section.

### INACTIVATING CHILD OBJECTS

When an HCO or HCP is inactivated, child objects on the entity might remain active. To preserve data quality and ensure that child objects are also inactivated, administrators and data managers can use this data maintenance job to find and automatically inactivate address, license, and Parent HCO child objects.



Using the automated child inactivation job enables administrators and data managers to do the following activities:

- Apply different inactivation rules in different countries.  
For example, if a business policy requires that licenses remain active in some countries, but the policy does not apply to other countries, you can create jobs for individual countries.
- Choose the child objects to inactivate: addresses, licenses, or Parent HCOs.
- View inactivation logs that identify the child objects that were inactivated during a job.
- Track where changes originated through the **Revision History**.

This feature is enabled by default.

### Applicable records and fields

Only customer-owned child objects can be updated. This includes customer-owned child objects on Veeva mastered records or third party mastered records.

Child objects can be inactivated on records with the following statuses:

- HCPs - Dead, Inactive, Retired
- HCOs - Closed, Inactive

**Note:** Safeguards are in place to ensure that child objects are not inactivated on active HCOs and HCPs.

### Previewing impacted child objects

Before you create and run a child object inactivation job, you can run a report to understand how many child objects will be impacted by the job. The report results provide the number of child objects for each entity by status.

Ad Hoc Queries

Database Last Updated: Apr 5, 2017, 4:25pm Next Update: Apr 5, 2017, 7:57pm Save Run

Record Details Counts & Summaries **Advanced**

```

51
52 union
53
54 select entity_type_v,hco_hco_status_v as "Entity Status","ParentHCO" as "Child Object",count(*)
55 from hco_parentco
56 where parentco_entity_vid_v = hco_vid_v
57 and parentco_parent_hco_status_v = 'A'
58 and hco_hco_status_v not in ('A','I')
59 and parentco_is_eeva_master_v = 'false'
60 group by hco_hco_status_v,entity_type_v
61
62 )
63
64 order by 1,2,3

```

Results (5 records) Record State: #

Table Chart

ENTITY TYPE	ENTITY STATUS	CHILD OBJECT	COUNT
Health Care Organization	Inactive	Address	1
Health Care Professional	Dead	Address	1
Health Care Professional	Inactive	Address	36
Health Care Professional	Inactive	ParentHCO	4
Health Care Professional	Retired	Address	1

Displaying 1 to 5 of 5 Show 25 1 of 1 <>

To run the report:

1. On the Network menu bar, click **Reports > Ad Hoc Queries**.



2. Click the **Advanced** tab.
3. Paste the following SQL query into the text area.

```

SELECT
    c.entity_type__v,
    e.EntityStatus,
    ChildObject,
    COUNT (*)
FROM
    (
        SELECT
            hcp.vid__v,
            hcp.hcp_status__v AS "EntityStatus"
        FROM
            hcp
        WHERE
            hcp.hcp_status__v NOT IN (
                'A',
                'U'
            )
        UNION
        ALL SELECT
            hco.vid__v,
            hco.hco_status__v AS "EntityStatus"
        FROM
            hco
        WHERE
            hco.hco_status__v NOT IN (
                'A',
                'U'
            )
    ) e INNER JOIN (
        SELECT
            entity_vid__v,
            entity_type__v,
            'Address' AS "ChildObject"
        FROM
            address
        WHERE
            address.address_status__v = 'A'
            AND address.is_veeva_master__v = 'FALSE'
        UNION
        ALL SELECT
            entity_vid__v,
            entity_type__v,
            'License' AS "ChildObject"
    )

```



```
FROM
    license
WHERE
    license.license_status__v = 'A'
    AND license.is_veeva_master__v = 'FALSE'
UNION
ALL SELECT
    entity_vid__v,
    entity_type__v,
    'ParentHCO' AS "ChildObject"
FROM
    parenthco
WHERE
    parenthco.parent_hco_status__v = 'A'
    AND parenthco.is_veeva_master__v = 'FALSE'
) c
    ON e.vid__v = c.entity_vid__v
GROUP BY
    c.entity_type__v,
    e.EntityStatus,
    ChildObject
ORDER BY
    entity_type__v,
    EntityStatus,
    ChildObject ;
```

4. To format the query, click **Format** at the bottom of the editor.
5. Click **Run**.

Review the child objects in the **Results** section.

### *Inactivate child objects*

Jobs can take some time to run, so prioritize your data and work with small, logical sets of data.

To inactivate child objects on inactive HCOs or HCPs:

1. In the Admin console, click **System Interfaces > Data Maintenance**.
2. On the **New Data Maintenance Job** dialog, select the **Child Object Inactivation** action.



A New Child Object Inactivation Job page displays.

[Data Maintenance](#) > [New Child Object Inactivation Job](#)

## New Child Object Inactivation Job

---

▼ **Details**

**Name**

**Action**

Automatically inactivate child objects of specified entities.

**Description**

---

▼ **Settings**

Allow File Reprocessing ?
 Job Error Log ?

Inactivation Log ?

---

▼ **Schedule**

Trigger  Scheduled  Manual

---

▼ **HCP Subset Options**

Choose the child objects to inactivate

Address  
 License  
 Parent HCO Relationship

---

▼ **HCO Subset Options**

Choose the child objects to inactivate

Address  
 License  
 Parent HCO Relationship

3. Specify a **Name** for the job.

After a Child Object Inactivation job has been created, the **Action** option cannot be changed.

4. Type a description for this maintenance job.

5. In the **Settings** section, select any of the available options:

- **Allow File Reprocessing** - All files in the source folder will be loaded, regardless of whether or not they have previously been loaded. This setting is enabled by default.
- **Job Error Log** - Export the error log to your FTP server.
- **Inactivation Log** - The log identifies the child objects that changed during the data maintenance job. A .zip file called `CHILD-OBJECT-INACTIVATION-LOG-<timestamp>-<job id>.zip` is exported to the outbound folder. Each child object has its



own .csv log file with the following naming convention: <Object>-Inactivation-LOG.csv. In the event that you need to revert any changes, the log files provide enough information so that you can. This log file is always exported with every child object inactivation job.

6. In the **Schedule** section, choose to run the job manually or on a schedule.
  - Manual - The job only runs when you click the **Start Job** button on the job page.
  - Schedule - Define when you want the job to run. Multiple schedules can be defined. The schedule is based on the user's browser time zone.
7. In the **HCP Options** and **HCO Options** section, choose the child objects that you want to inactivate: **Address, License, Parent HCO Relationship**.
8. If you selected a child object, choose how you will specify the records to inactivate.
  - **FTP** - Create a .csv file with the of the HCPs or HCOs. Define the path and file name of the .csv file.

Choose the HCP records that will have its child objects inactivated

FTP

/  ?

Use Filters

- You can use one file to contain both HCOs and HCPs and identify it in either the **HCP Subset Options** or the **HCO Subset Options** section.
- If you use separate files, the file names can be different, but the FTP path must be the same.

Requirements for the .csv file:

- One column only that contains the lists of Veeva IDs (VIDs)
- Column header is optional and must not have any other characters around the text
- VIDs must be listed in separate rows
- Double quotation marks ("" ) around VIDs are permitted
- No extra characters; for example, commas (,) after VIDs
- File name must be exactly the same format as it is on the FTP site; capitalization matters (for example, VIDS.csv is not the same as VIDs.csv)

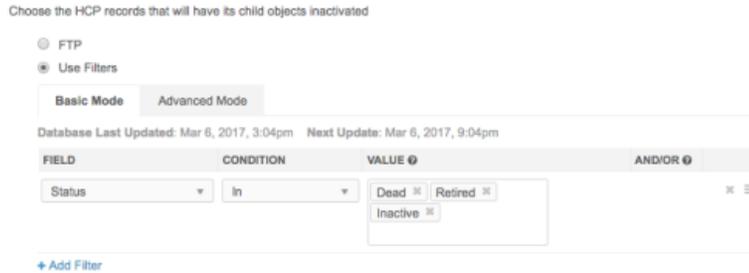
A
242979800367498243
242979800367498245
242979800367498246
242979800367498247
242979800375886848
242979800384275456
242979802120717313
242979802120717316
242979802137494528
242979802506593281
242979802514981888
242979802682754048
242979803068630018
242979803118961668
242979803236402179



- **Use filters** - Use basic filters or an advanced filter (using SQL) to identify the records where you want to inactivate child objects. To use filters, Network Reporting must be available.

**Basic mode**

The default filters can be changed or added to.



**Advanced mode**

Using advanced mode, you can apply different inactivation rules in different countries.



The reporting database identifies the records that are selected in Basic or Advanced queries. You might see a discrepancy between what reports or filters indicate versus the actual status of records in the instance. When you are analyzing inactive child objects, take note of the **Database Last Updated** time to know when the reporting database was last updated for your instance.

9. **Save** your changes.

If child objects are inactivated, Network business rules run on the record, so there might be changes to other fields. For example, if a ParentHCO is inactivated, the address that was created from Network Address Inheritance will be disqualified. All changes will be documented on the Revision History page (**Profile > Revision History**).



### Viewing results

After a child inactivation job has run, click the job name on the Data Maintenance page and view the **Job History** section at the bottom of the page.

The summary table displays the outcome and the count of child objects inactivated for each job.

Job History						
ID	START TIME	DURATION	TYPE	OUTCOME	INACTIVATED ADDRESS	INACTIVATED LICENSE
26	2017-02-02 12:29:00	a few seconds	MANUAL	COMPLETE	13	5

### Job details

For more information about each job, click the link in the **ID** column to open the Job Details page.

Job Details (ID: 188) Cancel Job

**Overview**

Subscription	InactivateAddressToronto	Action	child_inactivation
Start Time	2017-03-06T12:25:00-05:00	Job ID	188
Duration	a few seconds	Percent Complete	100.00%
Current Stage	FinalStage	Outcome	COMPLETE
Started By	Network_admin	Trigger	MANUAL

[Job Settings Summary](#)  
[Data Load Summary](#)  
[Processed Data Summary](#)  
**Job Result Summary**

	INACTIVATED
Address	23
License	1
Parent HCO	12

### Inactivation logs

An inactivation log is created for each child object that you chose in the job configuration. Each log provides information on the records that were inactivated during the job. If a mistake was made, you can use this information to create a source subscription to revert the changes.

#### Address

	A	B	C	D	E	F
1	vid__v	entity_vid__v	entity_type__v	entity_status__v	old_address_status__v	address_status__v
2	929931123132596268	929931123129843750	HCP	I	A	I
3	929931123132071969	929931123129843750	HCP	D	A	I
4	929931123132071968	929931123129843749	HCP	R	A	I
5	929931123132596267	929931123129843749	HCO	C	A	I



## License

	A	B	C	D	E	F
1	vid_v	entity_vid_v	entity_type_v	entity_status_v	old_license_status_v	license_status_v
2	929931123132465198	929931123129843750	HCP	I	A	I
3	929931123132399653	929931123129843750	HCP	R	A	I
4	929931123132465197	929931123129843749	HCP	D	A	I
5	929931123132399652	929931123129843749	HCO	C	A	I

## Parent HCO

	A	B	C	D	E	F	G
1	vid_v	entity_vid_v	entity_type_v	parent_hco_vid_v	entity_status_v	old_parent_hco_status_v	parent_hco_status_v
2	929931123137970214	929931123129843750	HCP	929931123132268575	I	A	I
3	929931123138166820	929931123129843750	HCP	929931123132268577	R	A	I
4	929931123138428965	929931123129843750	HCP	929931123132268579	D	A	I
5	929931123138428964	929931123129843749	HCO	929931123132268579	I	A	I

## Tracking changes

All child inactivation changes to an HCP or HCO record can be viewed in the **Revision History** from the profile page. Any changes to other fields on the record because of an inactivated child object is also documented here.

Search (term: eric) > Eric Bledsoe > Revision History

VERSION	TIMESTAMP	SYSTEM	ACTION
2.0	2017-03-03 01:08:00	Data Maintenance	Update from source
1.0	2017-02-03 13:46:00	SAP	Add from source

## Reverting changes

If a child object is inactivated in error, you can use the information in the inactivation log file to create a source subscription and undo the specific changes.

## Considerations for US Veeva OpenData records

There might be inactive HCPs with active and unexpired State Licenses and DEA Registrations in US OpenData in Network. State License and DEA record status is determined by evidence provided by the source. There might be a delay in the timing between when an HCP is inactivated and when the State Board or DEA updates the License or Registration.

## REPORTING

Job summary reports for data maintenance jobs provide statistics for each job. A new job type called `update` has been added so administrators can quickly view information about the data maintenance jobs that have run in their Network instance.



To run a summary report for data maintenance jobs:

1. In the Network menu bar, click **Reports > Ad Hoc Queries**.
2. On the **Record Details** tab, select the **Job Summary** report type.
3. In the **Filters** section, define the criteria in the following lists:
  - **Field:** Choose **Job Type**
  - **Condition:** Choose **Find**
  - **Value:** Type `update`.
4. Click **Run**.

The data maintenance job statistics display in the **Results** section.

Reports > Ad Hoc Queries

### Ad Hoc Queries

Database Last Updated: Mar 22, 2017, 8:37am Next Update: Mar 22, 2017, 12:37pm Save Run

Record Details | Counts & Summaries | Advanced

REPORT TYPE

NAME	DESCRIPTION
HCP	Health Care Professionals with related address, licenses and parent HCOs that best meet your criteria.
HCO	Health Care Organizations with related address, licenses and parent HCOs that best meet your criteria.
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, update and target jobs.

COLUMNS

FILTERS

FIELD	CONDITION	VALUE	AND/OR
Job Type	Find	update	

+ Add Filter

Sort By

+ Add Sort Criteria

Run

Results (31 records)

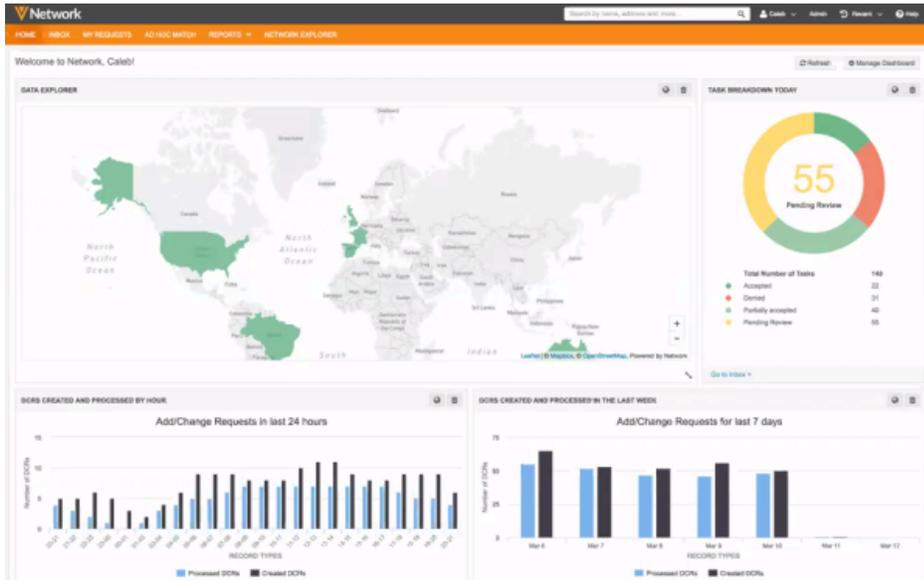
JOB ID	JOB TYPE	SUBSCRIPTION	START TIME	END TIME	OUTCOME	STARTED BY	HCPs PROCESSED	HCOS PROCESSED
3055	update	InactivateAddresses	2017-03-15 12:54:54	2017-03-15 12:55:32	COMPLETE	admin@verteo.veevanetwork.com	13	10
3137	update	InactivateAddresses	2017-03-17 16:01:50	2017-03-17 16:01:53	COMPLETE	admin@verteo.veevanetwork.com	11	16
3140	update	Data_dedup_US_CA	2017-03-17 16:07:12	2017-03-17 16:07:14	COMPLETE	admin@verteo.veevanetwork.com	10	12



## Home dashboard

Administrators and data managers can now access a home dashboard that contains a customizable set of widgets. The widgets provide instant access to information that is important to these users.

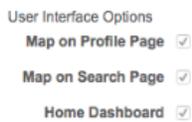
This feature is not enabled by default.



## ENABLING THE DASHBOARD

Administrators can enable the Home Dashboard feature for their Network instance.

1. In the Admin console, click **Settings > General Settings**.
2. In the **User Interface Options** section, select **Home Dashboard**.



When administrator and data managers log into the Network instance, a personal and customizable dashboard displays.

Users can click **Refresh** to update the data in real time.

## DASHBOARD WIDGETS

Users can customize their home pages by adding, removing, or dragging widgets to different positions on the page. Changes are automatically saved.

Several different types of widgets are available for administrators and data managers.



## Data Explorer

Administrators and data managers can view this map widget that highlights all of the countries that they have visibility to through their data visibility profile, even if there is no data for that country in their Network instance. If a user has access to only one country, the map zooms into that country, by default.



### Actions:

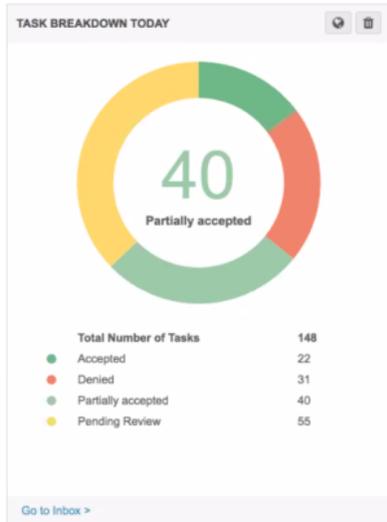
- Click the **World** button and select a specific country to zoom the map to.
- Click on a country to display a count of all of the record types by owner (customer, Veeva OpenData, third party master).
- Click any of the entity or count labels to search for those records.



- Click **See all records** to go to the Search results for all.

## Task Breakdown Today

Data managers can access the **Task Breakdown Today** widget to display all of the tasks in their local time (browser time). The widget queries the Inbox for the task information. The query uses the primary country defined for each entity and all the users in the same inbox task groups as the data manager.

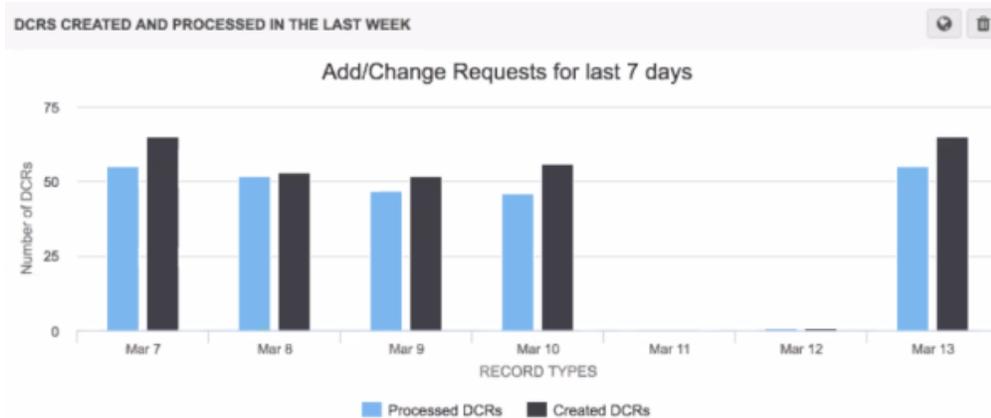


**Actions:**

- Click **Go to Inbox** to navigate to the Inbox.
- If you have access to inbox task groups in more than one country, click the **World** button to select a specific country to display.

*DCRs Created and Processed in the Last Week*

Administrators and data managers can use this widget to access a breakdown of the number of created and processed DCRs for each of the countries that they have access to through their inbox task groups. The widget query is based on the user's browser time and includes weekends. A bar chart displays the last seven days, from the current day. The DCR count includes all of the DCRs that were processed by all users that have the same inbox task group as the administrator or data manager.



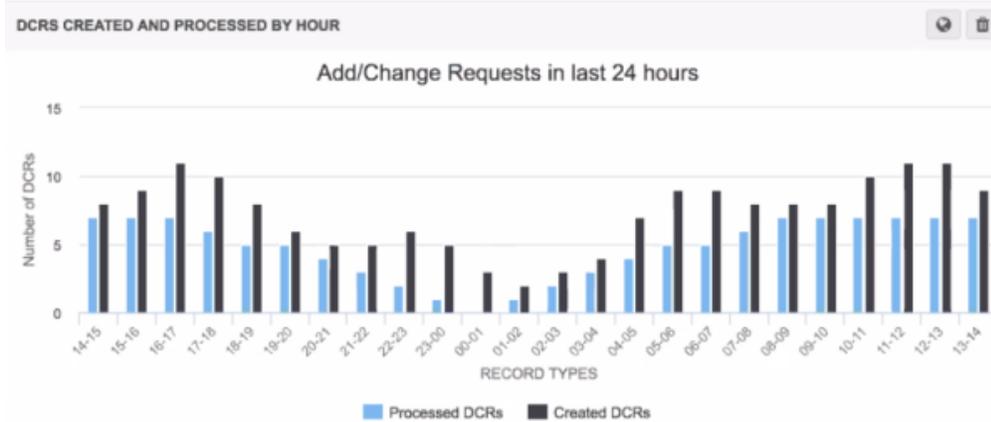
**Actions:**

- If you have access to inbox task groups in more than one country, click the **World** button to select a specific country to display.



### DCRs Created and Processed by Hour

Data managers can use this widget to access the number of DCRs that were created and processed, by hour, the last 24 hours. The query is based on the user's browser time and the countries that display depend on the user's inbox task groups. The counts reflect the DCRs that were processed by users that have the same inbox task groups as the data manager.

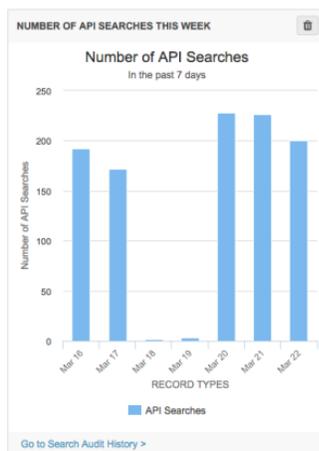


#### Actions:

- Click **Go to Inbox** to navigate to the Inbox.
- If you have access to inbox task groups in more than one country, click the **World** button to select a specific country to display.

### Number of API Searches

Administrators can access the number of Veeva CRM searches that occurred in the past week. The query is based on the user's browser time. The widget displays a bar chart for the last seven days from the current day.



#### Actions:

- Click the **Go to Search Audit History** link to navigate to the **Search Audit History**.



### Data Quality Results

From their personal homepage, data managers can access data quality results if a data quality report was run in the instance. The widget contains the latest run data. The widget displays all the entity groups and test cases, by default. If data managers want to see the data by date, this can be viewed directly from the Data Quality Reports page.

TEST CASES	DN HCOs	DE Ambulatory Health Care Organizations	DE Ancillary Services	DE Dental Practices	DE Health Care System Administration	DE Hospital Departments	DE Hospitals	DE Pharmacies	DE Practices	ES Ambulatory Health Care Organizations	ES Ancillary Services	ES Pharmacies
Address - Inactive Address Flagged as Primary Address	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Address - Active Address on Inactive HCP/HCO	-	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Address - Active Rank 99 Address	-	-	-	-	-	-	-	-	-	-	-	-
Address - Duplicate Active Address	-	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Address - Duplicate Address Rank	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Address - HCO with Duplicate Address Type	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Address - Improper Zip Code (US)	-	-	-	-	-	-	-	-	-	-	-	-

**Actions:**

- Click a test case or entity group to navigate to the Data Quality Reports page.
- Click the **Customize** button to choose the entity groups and test cases that display.

### Steward Productivity over Time

Data managers can use this scorecard to access the number of processed task, by data steward, for the past week. All data stewards in the same inbox task groups as the data manager are listed on the scorecard. The query is based on the data manager's browser time. The widget displays the last seven days, excluding weekends. The buckets are dynamic, so the ranges will change depending on the available data.

DATA STEWARD	March 13 2017	March 12 2017	March 11 2017	March 10 2017	March 9 2017
Royal, Barbara	81	27	88	52	98
Williams, Paul	4	14	43	46	30
Washington, Hector	99	93	59	12	27
Araya, Kimberly	4	21	90	42	5
Rosson, Jordan	12	83	82	98	71
Cooklin, David	80	98	86	88	40

**Actions:**

- Select any number of active data stewards that belong to the same inbox task group.

### Last 10 Import Jobs

Administrators can use this widget to view information about the last 10 jobs in the Network instance. The query is based on the administrator's browser time and the results are sorted by the last modified time of the job. The widget includes all import jobs; for example, source subscriptions, OpenData subscriptions, and data maintenance jobs. The list includes suspended, active, canceled, interrupted,



paused, parked, stopping, completed, failed, and killed jobs. The number in the **Add** and **Update** columns is the sum of the columns in the **Job Result Summary** from the Job Details page (Added, Candidates Added, Updated, Invalidated, and Merged).

LAST 10 IMPORT JOBS								
Subscription	Job	Completion Time	HCP Add/Update	HCO Add/Update	Address Add/Update	License Add/Update	Parent HCO Add/Update	Custom Keys Add/Update
Active Address on Inactive HCP_HCO	3223	2017-03-20 02:15:00	7	11	24	0	0	0
Active Affiliations on Inactive HCPs	3221	2017-03-20 01:00:00	14	0	0	0	18	0
cs_import	3209	2017-03-19 15:15:00	71	30	94	63	26	0
Active Address on Inactive HCP_HCO	3195	2017-03-19 02:15:00	16	8	20	0	0	0
Active Affiliations on Inactive HCPs	3193	2017-03-19 01:00:00	17	10	0	0	18	0
sap_source	3190	2017-03-15 23:24:00	31	27	43	27	8	58
Active Address on Inactive HCP_HCO	3189	2017-03-14 23:22:00	3	1	5	0	0	0
Active Affiliations on Inactive HCPs	3188	2017-03-14 23:19:00	5	0	0	0	2	0
cs_import	3187	2017-03-12 23:18:00	13	5	20	11	3	0
sap_source	3177	2017-03-11 15:15:00	22	10	34	20	7	26

### Actions:

- Click the **Customize**  button to select the type of subscription that you want to view. If you select multiple subscriptions, the query lists the 10 jobs that were modified the most recently overall.
- Click the Job **ID** link to navigate to the Job Details page.

## ADD WIDGETS

On the Network home page, administrators and data managers can click **Manage Dashboard**. A list of all available widgets display, by user type. Widgets that currently display on the home page are selected.

## REMOVE WIDGETS

Administrators and data managers can remove any widget by clicking the **Remove**  button in the top right corner of a widget.

Widgets can also be removed by clearing the check box in the **Manage Dashboard** list.

## SAVING CHANGES TO WIDGETS

Any changes to remove, add, or resize widgets on the home page are automatically saved.

## Child affiliation

---

The **Child Affiliations** section on profile pages for HCOs is enhanced so users can easily identify active and inactive child affiliations.

On the profile page, the **Child Affiliations** section is grouped by **HCO Affiliations** and **HCP Affiliations**. In the **HCO Affiliations** section, active child affiliations display by default. To view inactive affiliations, click **show inactive**. In the list, inactive child affiliations are dimmed.



Child Affiliations Hierarchy Type Select an option Sort by Name ↑

HCO AFFILIATIONS 6 - 10 of 10 < >

- Corporate Name** Toronto Medical Group  
33 Toronto Pl Ste 320 Pasadena CA 91105

**Hierarchy Type** Operating/Ownership Hierarchy

**Relationship Type** No Value
- Corporate Name** Toronto Dialysis Clinic  
13400 E Shea Blvd Scottsdale AZ 85259-5452

**Hierarchy Type** Operating/Ownership Hierarchy

**Relationship Type** No Value
- Corporate Name** Toronto Emergency Clinic  
Dept Of Surgery 24 Hospital Ave Danbury CT 06810-6099

**Hierarchy Type** Individual to Organization Affiliation

**Relationship Type** No Value
- Corporate Name** Toronto Medical Center  
1000 1st Dr NW Austin MN 55912-2941

**Hierarchy Type** Operating/Ownership Hierarchy

**Relationship Type** No Value
- Corporate Name** Toronto Women's Hospital  
5777 E Mayo Blvd Phoenix AZ 85054-4502

**Hierarchy Type** Operating/Ownership Hierarchy

**Relationship Type** No Value

HCP AFFILIATIONS [hide inactive](#)

[View 4 active child HCP affiliations](#) [View 3 inactive child HCP affiliations](#)

In the **HCP Affiliations** section, links for HCPs with active and inactive relationships to HCOs navigate you to the Network search results where you can view the records.

## Candidate records

### PROMOTING RECORDS

Data stewards and data managers can now apply and promote candidate records at the same time.

On the candidate record profile, when these users click **Resolve**, they can choose to **Apply and Promote** the record in the same action. The profile is updated immediately with all of the changes and the record is promoted, which makes it available to downstream systems.

**Apply Change Request** ✕

Please select an action

Apply Changes

Apply Changes and Promote Record

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

Notes



## Veeva OpenData

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The following enhancements have been added to Veeva OpenData for this release.

### GEO SUBDIVISION AND CLUB INTER PHARMACEUTIQUE FIELDS

Veeva OpenData offers Geo Subdivision data and Club Inter Pharmaceutique (CIP) data in some European countries. You can now enable fields so that you can download and view the data in Network. These data subscriptions are managed as separate products from Veeva OpenData, but are available to customers who subscribe to Veeva OpenData in the same country where they are offered.

The data is available to customers in the following countries:

- **Geo Subdivision** - France, Hungary, Monaco
- **Geo Subdivision 2** - Hungary
- **CIP** - France, Monaco, Andorra

To subscribe to this data, contact a Veeva OpenData representative.

### *Enable fields in Network*

If you have subscribed to the Geo Subdivision or CIP data, you can enable the feature so that data for the corresponding fields is downloaded from Veeva OpenData.

To enable the feature:

1. In the Admin console, click **System Interfaces > Veeva OpenData Subscriptions**.
2. Select the country that has subscribed to the data.
3. In the Veeva OpenData subscription for that country, in the **Field Level Subscriptions** section, select the subscription name:
  - **Geo Subdivision Data**
  - **Geo Subdivision 2 Data**

or

- **Include CIP ID Data**
4. **Save** your changes.

The following fields are automatically enabled for the Veeva OpenData subscriptions in the related country:

- **Geo Subdivision** - `geo_subdivision_1__v`, and `geo_subdivision_1_label__v`
- **Geo Subdivision 2** - `geo_subdivision_2__v`, and `geo_subdivision_2_label__v`

These fields are available on the address child object.

- **CIP** - `cip_id__v`, `cip_id_old__v`, and `cip_id_old_end_date__v`



These fields are available on the HCO entity

The Veeva OpenData subscription for that country is updated to start receiving data for these fields.

**Note:** If the **Geo Subdivision Data**, **Geo Subdivision 2 Data**, or **Include CIP ID Data** options are dimmed, you do not have a subscription to Veeva OpenData for that country. You can still use the fields locally by enabling them on the Data Model page. To subscribe to Veeva OpenData, contact a Veeva representative.

### Unsubscribing

If you unsubscribe to the Geo Subdivision and CIP OpenData subscriptions, the enabled fields can be used for local data.

If you subscribe to these OpenData subscriptions again, ensure that any existing local data in those fields are not overwritten.

#### Suggestions for preserving local Geo Subscription and CIP data before loading data from Veeva OpenData:

- Export your data in a target subscription.
- Run a report on your current fields.
- Preserve current data by creating custom fields.
- Reload the previously exported local data into the new custom fields.

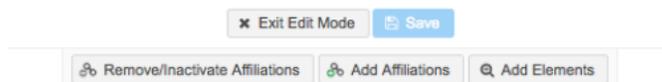
### Network explorer

The editing feature for data stewards and data managers has been enhanced to provide more visibility to the action buttons.

- The **Edit** button has been centered on the Network Explorer canvas.



- When Network Explorer is in edit mode, the buttons on the editing ribbon now contain labels so that the functions are easily recognizable.



### Match

#### MATCH ANALYSIS LOG

This log file that is exported from a source subscription is updated so that all fields with multiple rows now use a tilde (~) instead of a carriage return.



## General updates

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The following enhancements have been made to date selection in this release.

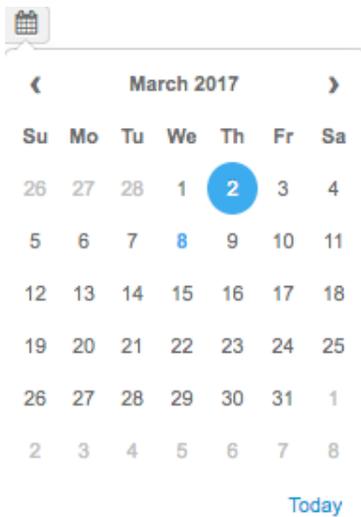
### DATE AND TIME SELECTION

When users are selecting dates, choosing the current date and time can now be more easily selected.

#### *Date*

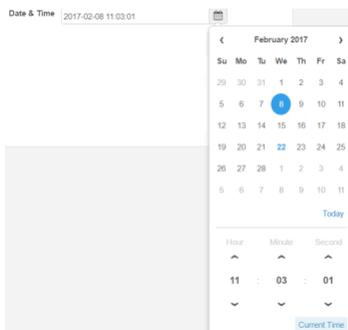
Users can click the **Today** link at the bottom of the dialog to immediately select today's date and close the dialog.

Today's date is now highlighted with bolded blue text, while the currently selected date is highlighted with the blue circle.



#### *Time*

When users are selecting the time, the **Current Time** link is now available to easily select the current time and close the dialog.





## API

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

### NEW VERSION

Network API version 11.0 is now available.

### CREATE A SUBSCRIPTION JOB

In version 11.0, new API has been added for creating new subscription jobs. This API supports all subscription types and systems and uses the POST method. The endpoint URL is as follows:

```
https://{dns}/api/{version}/subscription/{subscription_name}/job
```

where:

- *dns* is URL for customer's API service
- *version* is the API version
- *subscription\_name* is the unique name of the subscription

### Parameters

For target subscriptions, the following parameters are supported:

Name	Required?	Description
data_revision_first	false	Start data revision for the job
data_revision_last	false	End data revision for the job
apply_data_revisions_for_delta_export_only	false	The above data revision parameters apply to a delta export only

There are no parameters for other subscription jobs.

### Sample request

POST [https://my.veevanetwork.com/api/v11.0/subscription/CRM\\_Import/job](https://my.veevanetwork.com/api/v11.0/subscription/CRM_Import/job)

### Sample response

```
{
  "responseStatus": "SUCCESS",
  "job_id": 63259874100112525
}
```



where:

- `responseStatus` is the response status confirming the success of the subscription.
- `job_id` is the unique ID of the job generated for the subscription provided in the URL.

### **CANCEL A SUBSCRIPTION JOB**

In version 11.0, new API has been added for canceling a specific subscription job. This API supports all subscription types and systems and uses the DELETE method. The endpoint URL is as follows:

```
https://{dns}/api/{version}/job/{job_id}
```

where:

- `dns` is URL for customer's API service
- `version` is the API version
- `job_id` is the unique ID of the job created

### **Parameters**

None.

### **Sample request**

DELTE https://my.veevanetwork.com/api/v11.0/job/63259874100112525

### **Sample response**

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

where:

- `responseStatus` is the response status confirming the success of the cancellation.

### **Notes**

Because the request to cancel the job is asynchronous, there is no guarantee that the request was successful. A status of success is returned, except when the API fails for the following reasons:

- The job ID cannot be found.
- The status of the job is not Active, Suspended, or Stopping.



The following features were introduced in Veeva Network versions 10.5.1 and 10.5.2.

## Data validation rules

### RULES APPLIED FOR ALL USERS

Data validation rules can now apply to standard users and administrators. Add these users to rules so that any add and change requests they submit are validated to ensure that data stewards have enough information to be able to process the record; otherwise, the record is rejected. Validating add and change requests for completeness ensures that the data steward's time is used effectively.

For standard users and administrators, data validation rules will run when they submit add or change requests using the Network user interface. For example, a standard user is added to a rule that ensures that all HCP records have at least one address defined. If the standard user creates an add or change request that does not include an address, the rule will fail when the request is submitted. The request cannot be submitted until an address is added.

The screenshot shows the Veeva Network user interface. At the top, there is a navigation bar with the 'work' logo and a search bar. Below the navigation bar, there is a sidebar with 'VALIDATION MESSAGES (3)' and a main content area titled 'Add New HCP Profile'. The validation messages list three errors: 'Please add an address to the HCP record', 'Select a gender', and 'Please enter a Primary Specialty'. The form for adding a new HCP profile includes a 'Primary Information' section with fields for 'Name' (Prefix, First Name, Middle Name, Last Name) and 'Gender'.

### Add users to rules

When you create new rules, data stewards and data managers are applied, by default, and cannot be removed from the rule. You can add standard users and administrators to new and existing rules.

To add a specific user to a data validation rule:

1. In the Admin console, click **System Interfaces > Data Validation Rules**.
2. Click a data validation rule.
3. In the **User Type** section, type *Standard User* or *System Admin*, or both.
4. **Save** your changes.



**HCP**

Rule Name	Message	Countries	Enabled	
Entity	HCP	Rule Name	HCP	
Code	hcp__c			
Description	HCPs must have at least one valid address			
Countries	Australia X United States X			
User Types	System Admin X Data Manager Data Steward Standard User X			
Enabled	<input checked="" type="checkbox"/>			
▼ FAILURE MESSAGE				
LANGUAGE	MESSAGE			
English	Please add an address to the HCP record X			
+ Add Language				

Data validation rules only apply to standard users and administrators when they are submitting add and change requests. These users cannot validate a record from the Profile page using the **Validate** button.

### Apply rule to add requests only

If you add a standard user or administrator to a data validation rule, the rule automatically runs when these users submit add and change requests. If you want a data validation rule to run only when these users submit add requests, you can define a filter on each rule that excludes change requests.

Standard users might submit a change on a record that originated from a source subscription, or a record that hasn't been updated in a long time. If the standard user updates a field and submits the change request, data validation rules run on the entire record. The standard user should not be responsible for cleaning up missing information for the entire record.

To add the filter, in the **Group** section, select the *Created Date* field and choose *Is Null* from the **Condition** list.

▼ GROUPS

Object Type: HCP X

▼ FILTERS

FIELD	CONDITION	VALUE	AND/OR
Created Date	Is Null		X

+ Add Filter

This filter excludes change requests from a rule because change requests have a create date. Now the rule only runs when a standard user or administrator submits an add request.

## System interfaces

---

### SCHEDULING JOBS

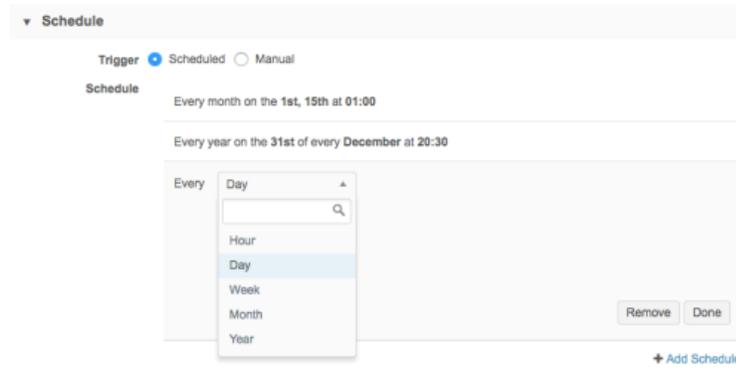
Administrators and data managers can now define multiple schedules for each job. Previously, only one schedule could be defined. This enhancement gives administrators and data managers more flexibility for running jobs.



The scheduling enhancement affects the following types of jobs:

- Source subscriptions
- Target subscriptions
- Veeva OpenData subscriptions
- US compliance target subscriptions

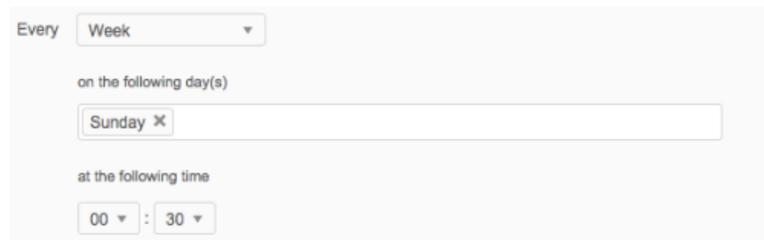
Subscriptions with existing schedules are preserved, but additional schedules can be added.



To define another schedule for the job to run, click **Add Schedule**.

**Tip:** To run a job at month end, select **Month** and **1st** as the day.

The time that you specify for each schedule is in your browser time zone. Your browser time zone might be different from the time zone defined in your user profile.



**Considerations for defining multiple schedules**

If jobs are scheduled to run close together, the following situations might occur:

- If there are no changes, the job does not run.
- If a job has not finished, and a second job is scheduled to begin, the second job will not run.



## Primary address and affiliation

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### AUTOMATICALLY DEFINING PRIMARY AFFILIATION AND PRIMARY ADDRESS

The primary designation for addresses and affiliations are important for many business reasons; for example, some sales representatives are compensated based on the primary affiliation of an HCP that they sampled. Network can automatically determine the primary address and primary affiliation to ensure that records have these fields defined. In this release, the behavior for automatically determining primary address and primary affiliation is enhanced to cover many scenarios.

### *Enabling primary address and primary affiliation*

Primary address and primary affiliation can be defined for each country using custom fields on the Address and Parent HCO child objects and the following data types:

- Primary Address
- Primary Affiliation

Network Data Model > Create Custom Field

### Create Custom Field

Cancel Save

▼ Properties

Name	is_primary_affiliation	Effective Version	N/A
Type	Primary Affiliation	Enabled?	<input checked="" type="checkbox"/>

These Network fields can be mapped in Veeva CRM. They are Boolean Reference Type fields with the following values: *True*, *False*, *Unknown* (treated as *False*), and *No Value*. If the custom fields are enabled, Network automatically determines primary for addresses and affiliations, unless the field value is *False* for all addresses or affiliations on the entity.

These fields must be created by administrators in the Network data model. For more information about creating these fields, see the *Veeva Network Online Help*.

### *Understanding how Network determines primary affiliation*

An entity can have only one primary affiliation. The field displays in the **Parent HCO Affiliations** section of a profile.



**Joan Cruz** ☆

320 E North Ave Pittsburgh Pennsylvania 15212-4756 US

**Network Entity ID:** 242979086315223044

**Alt Key:** ALT-SEB75APX3

**Verteo ID:** VSEB-75A-PY3

**Primary Specialty:** Unspecified specialty

**HCP Type:** Non-Prescribing Health Care Professional

**Degree:** Doctor of Medicine

**Phones:** 4123993131

**Licenses:** PA RN231360L

**Modified Date:** 2017-01-04 10:26:15

Primary Information

Addresses View Map

Parent HCO Affiliations Sort by Name ↑

**Corporate Name:** Pittsburgh General Hospital  
320 E North Ave Pittsburgh PA 15212-4756  
Alt Key: ALT-SEB774TM3

**Relationship Type:** No Value

**Primary Affiliation:** Yes/True

**Corporate Name:** Allegheny General Hospital  
110 W North Ave Pittsburgh PA 15212-4700  
Alt Key: ALT-SEB774TM3

**Relationship Type:** AMA Group Practice to Provider

**Primary Affiliation:** No/False

Network automatically determines primary affiliation for the following cases:

- An existing primary affiliation is inactivated or a new primary affiliation is set to inactive (`parent_hco_status__v = I`).
- An existing primary affiliation is invalidated or a new primary affiliation is set to invalid (`record_state__v = INVALID`).
- An existing primary affiliation is not primary anymore.

If an existing primary affiliation value is set to *False*, that affiliation is excluded when Network recalculates primary.

**Note:** Network does not automatically recalculate primary if Veeva OpenData changes the master primary affiliation field.

Primary affiliation is automatically calculated, for the cases listed above, during the following actions:

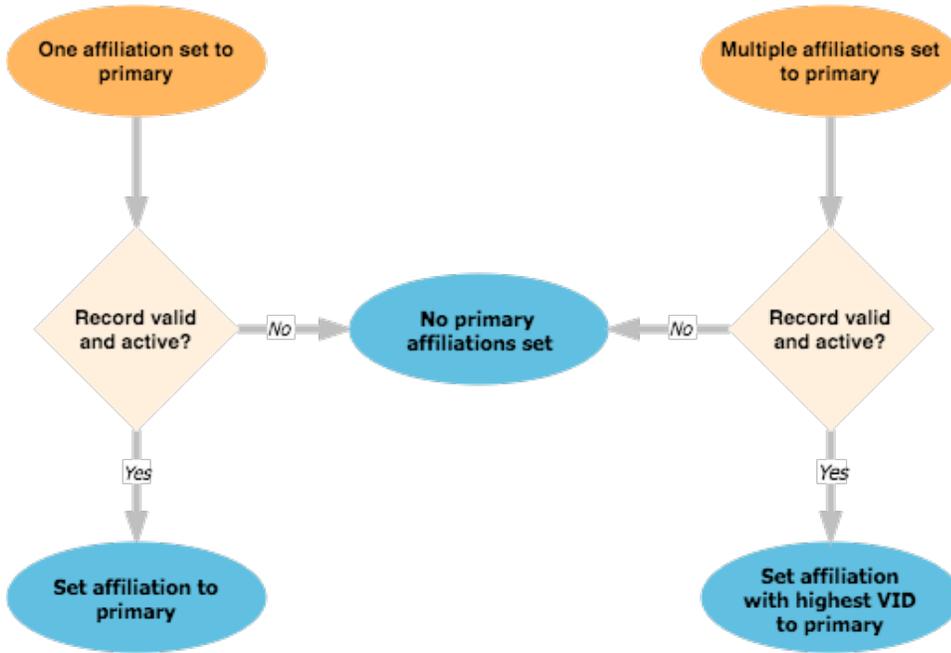
- Data load using source subscriptions
- Changes to records on the Profile page
- Processing data change requests
- Change Request API
- Merge and unmerge

During merge, Network determines the primary affiliation regardless of whether the primary was on the winning or losing record. When records are unmerged, affiliations that were defined as primary on each record before a merge are recovered. If there were no primary affiliations prior to a merge, a primary is automatically defined for the unmerged entities.

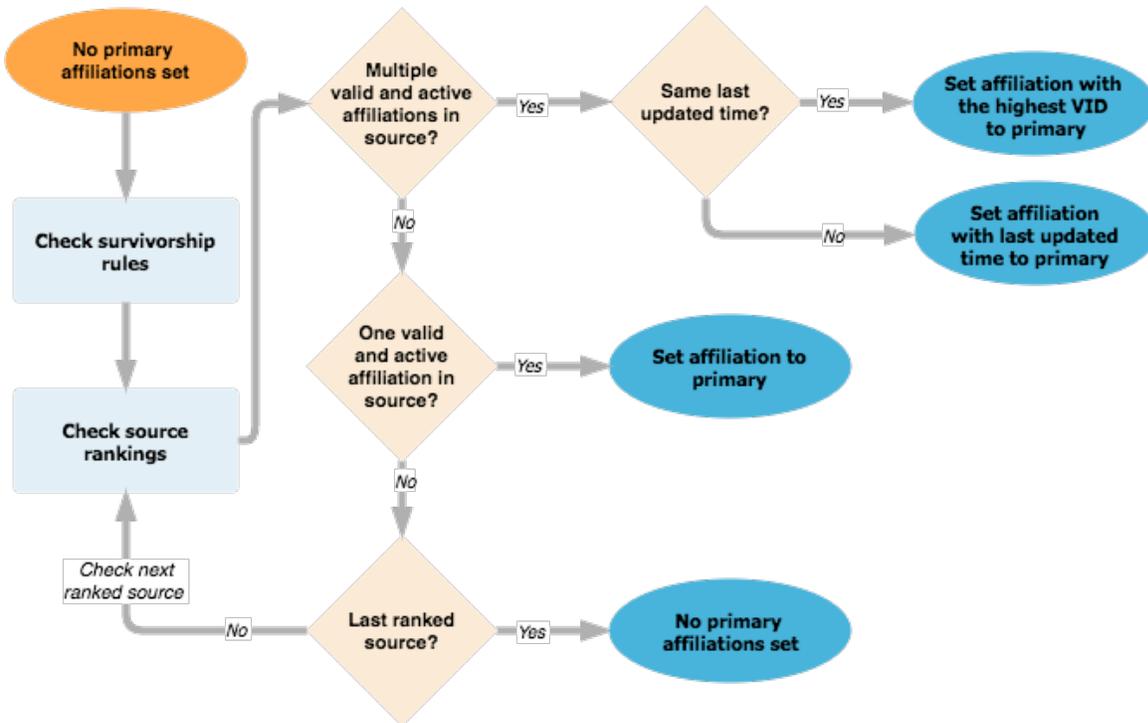
The following diagrams contain various scenarios and outcomes for setting primary affiliation:



### One or more affiliations are set to primary



### No affiliations are set to primary





## Understanding how Network determines primary address

An HCP can only have one primary address. The field displays in the **Address** section of a profile.

Search (term: \*) > John Smith

 **John Smith** ☆ 

2623 Westwind Ln Erie Pennsylvania 16506-6203 US  
**Network Entity ID:** 242979994412778508  
**Alt Key:** ALT-SEB77WF53  
**Verteo ID:** VSEB-77W-F53  
**Primary Specialty:** Unspecified specialty  
**HCP Type:** Non-Prescribing Health Care Professional  
**Degree:** Registered Nurse  
**License:** PA RN214147L  
**Modified Date:** 2016-12-06 10:50:58

Primary Information

Addresses View Map

**Professional** 2623 Westwind Ln Erie Pennsylvania 16506-6203 US  
 Primary Address: Yes/True

**Professional** 2312 White Deer Pike New Columbia Pennsylvania 17856-9253 US  
 Primary Address: No/False

[Add Address](#)

Network automatically determines primary for the following cases:

- An existing primary address is inactivated or a new primary address is set to inactive (`address_status__v = I`).
- An existing primary address is invalidated or a new primary address is set to invalid (`record_state__v = INVALID`).
- An existing primary address is not primary anymore.

If a user sets an existing primary address to *False*, that address is excluded when Network recalculates primary.

**Note:** Network does not automatically recalculate primary if Veeva OpenData changes the ordinal of the address ranking.

Primary address is automatically calculated, for the cases listed above, during the following actions:

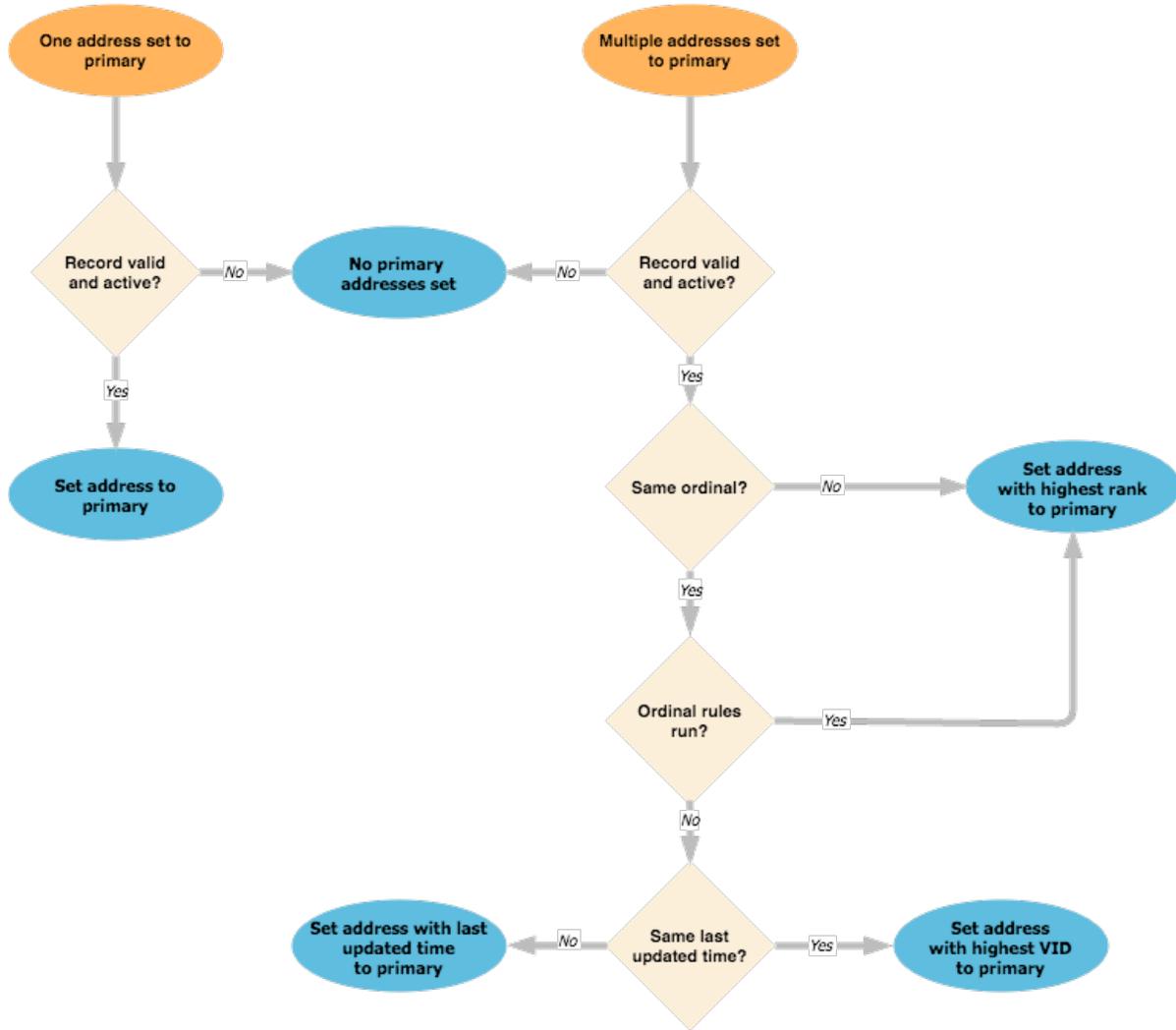
- Data load using source subscriptions
  - Changes to records on the Profile page
  - Processing data change requests
  - Change Request API
  - Merge and unmerge
- When records are merged, the primary address is determined regardless of whether the primary was on the winning or losing record prior to merge.
- During unmerge, previous primary addresses are recovered from the winning and losing records. If there was no primary address defined on the record prior to merge, a primary is automatically defined.



Network uses a set of business rules to determine what address will be set to primary for a record. The primary address business rules might run before or after the address ordinal rules. As a result, when addresses have the same ordinal, the flow that determines which address is set as primary might be different. If the address ordinal rules run first, each address will have a unique rank, so the highest ranking address will be set as primary. If the primary address rules run first, each address will have the same rank, so Network proceeds to check the last updated time.

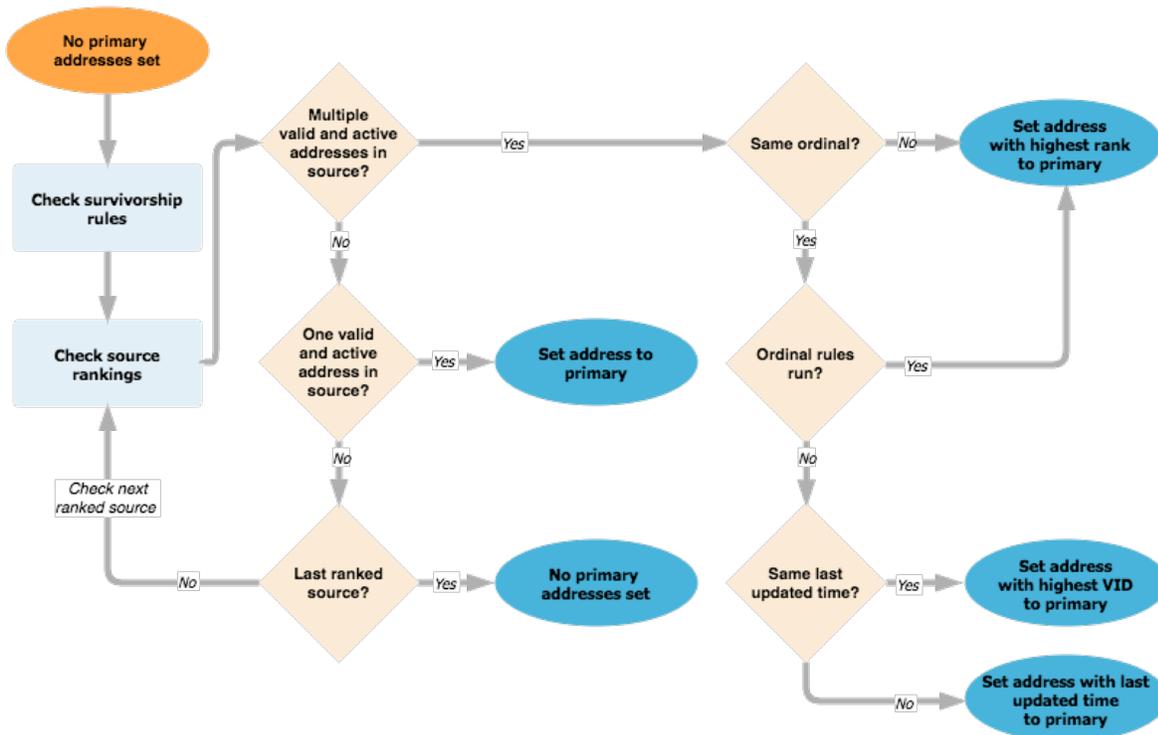
The following diagrams contain various scenarios and outcomes for setting a primary address.

### One or more addresses are set to primary





### No addresses are set to primary



### Job details

The following topic contains enhancements for source subscription job details in this release.

### REJECTED RECORDS

The **Job Results Summary** table contains a new column to display the number of records that were rejected during the data load. This enhancement helps to makes the data loading processes more transparent so that you can understand why your Network database was not updated. These job statistics are also available for analyzing using Network reports.

▼ Job Result Summary

	TOTAL	ADDED	CANDIDATES ADDED	UPDATED	MERGED	INVALIDATED	NOT LOADED	REJECTED
HCP	15	15	0	0	0	0	0	1
HCO	7	7	0	0	0	0	0	0
Address	16	16	0	0	0	0	0	0
License	8	8	0	0	0	0	0	0
Parent HCO	9	9	0	0	0	0	0	0
Custom Keys	46	46	0	0	0	0	0	1

Rejected records are different from records that were not loaded. The **Job Result Summary** table has columns to identify records in each of these situations.



**Rejected records** - Source records that were processed and loaded but were not persisted in the Network database because there was an issue with the content of the record.

Records are rejected for the following reasons:

- Duplicate custom keys - Administrators have enabled the **Reject Duplicate Keys** option in the General Settings so that no duplicate custom keys can be loaded into their Network instance.
- ParentHCO records have invalid parent IDs - A ParentHCO record must have a valid parent ID and for the record (relationship) to be valid.
- Records have invalid reference codes.
- NEX rules - The **Job Error Log** section displays the NEX rule that caused the record to be rejected during the After Update rule point stage of the data load.

Rejections are not tracked for the File Preparation and Transformation rule point stages. For more information about the rule points, see the *Veeva Network Online Help*.

**Not Loaded records** - Source records were skipped or merged during the data load process.

Records are not loaded for the following reasons:

- Unmatched records are skipped - In the source subscription, the **Action for Unmatched & Suspect Match** option is set to *No Action*.

## ADDITIONAL INFORMATION

The Job Details page now provides more information so administrators and data managers can understand the settings that were selected for each source subscription job.

The Job Details page is updated with changes to the following sections:

### *Overview section*

A blue icon  displays beside the **System** name so that you can quickly identify if the subscription used a third party source system.

### *Job Settings Summary section*

This is a new section that includes the following enhancements for users:

- Displays settings that were activated or deactivated for a particular job.
- Provides information about settings that were activated. For example, you can see the selected setting for **Action for Unmatched & Suspect Match**.
- Allows users to report against the match log for a source subscription job.

If **Export Data Group Analysis** or **Export Match Analysis** was activated for a subscription, an **Analyze Match Log** button displays. Clicking the button redirects you to the **Advanced** tab on the Ad Hoc Queries page where you can analyze the match log by reporting on it.



**Note:** It can take several minutes to prepare the match logs for reporting. You can navigate away from the Job Details page while the match log is being rerouted.

After you click the **Analyze Match Log** button, the button name updates to advise that the log has been published Match Log Published.

Job Settings Summary	
<b>PROCESSING SETTINGS</b>	<b>VALUE</b>
Allow File Reprocessing	Activated
<b>MATCH SETTINGS</b>	<b>VALUE</b>
Action for Unmatched & Suspect Match	Deactivated
Match Against OpenData	Deactivated
Source Dedupe	Activated
<b>MERGE SETTINGS</b>	<b>VALUE</b>
Apply Updates & Merge	Deactivated
<b>LOG SETTINGS</b>	<b>VALUE</b>
Export Data Group Analysis	Deactivated
Export Match Analysis	HCP, HCO
Job Error Log	Activated

[Analyze Match Log](#)

### Files Loaded Summary section

This new section displays the list of source files that were loaded during the source subscription job.

Files Loaded Summary	
FTP Path	InboundResource
ALIAS	FILE NAME
ADDRESS	ADDRESS.csv
HCP	HCP.csv

## Suspect match

### ASSIGNMENT OF SUSPECT MATCH RESOLUTION TASKS

Tasks that are generated after a suspect match resolution are now automatically assigned to the same data steward that resolved the suspect match task.

When data stewards process a suspect match task, the outcome results in an add or change request. The add or change request will be assigned to the same data steward. This enhancement makes the task process more efficient by automatically assigning it to the data steward who already has knowledge about the task.

The task assignment is logged in the Task Audit History with the **Action Type** called *AssignTask*.

ID	TASK ID	ACTION DATE	ACTION TYPE	USER NAME	RELATED ITEMS	MESSAGE
380	828728280419104	2017-02-02 17:37:10	ChangeState	System	DCR ID: 828728280419104	Changed task state from PENDING/SUSPECTMATCH to PENDING/VIEW
380	828728280419104	2017-02-02 17:37:09	CompleteTask	data-steward0		Closed task.
380	828728280419104	2017-02-02 17:37:09	AssignTask	data-steward0	DCR ID: 828728280419104	Assigned to data-steward 2 J@veeva.com
381	828728280419104	2017-02-02 17:37:09	ReassignOfficer	System	DCR ID: 828728280419104	Received notification of PENDING/SUSPECTMATCH from 2282728280419104
380	828728280419104	2017-02-02 17:37:09	ChangeState	data-steward0		Changed task state from PENDING/VIEW to PROCESSED.



## Search

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### SEARCH ENHANCEMENTS

The following enhancements have been added to Network Search:

- Custom keys - Search does not match on custom keys that have a status of *Source Deactivated* (SD) or *Inactive* (I).
- Child objects - Search only matches on licenses, addresses, and relationships with *Valid* or *Under Review* record states.
- Child object filters - Quick filters are nested and applied to the selected **Parent Affiliation**.

For example, if you define a **Quick Filter** to narrow your search results to only include active HCPs that have an active relationship to an HCO called Valent Medical Group, the search results are filtered to only display the HCPs that meet that criteria for Valent Medical Group. Any inactive HCPs or HCPs with an inactive relationship to Valent Medical Group do not display in the results.

The screenshot shows a search interface with the following sections:

- SEARCH** (header)
- QUICK FILTER** (dropdown menu)
  - HCP Status (dropdown: Active)
  - Relationship Status (dropdown: Active)
  - Buttons: Filter, clear, Add Filter
- PRIMARY COUNTRY** (dropdown menu)
- ENTITY TYPE** (checkbox list)
  - All
  - HCP (22)
- PRIMARY SPECIALTY** (dropdown menu)
- PARENT AFFILIATION** (checkbox list)
  - All
  - Valewood Clinic (40)
  - North Dandenong Clinic (22)
  - Valent Medical Group (10)
  - Hillcrest Health Centre (14)
  - Robinvale District Medical Centre (11)
  - [Show More](#)
- RECORD OWNER** (dropdown menu)

### STREET VIEW

Using the map in the search results, users can now open an entity's address in street view directly from the business card.



To view the business card:

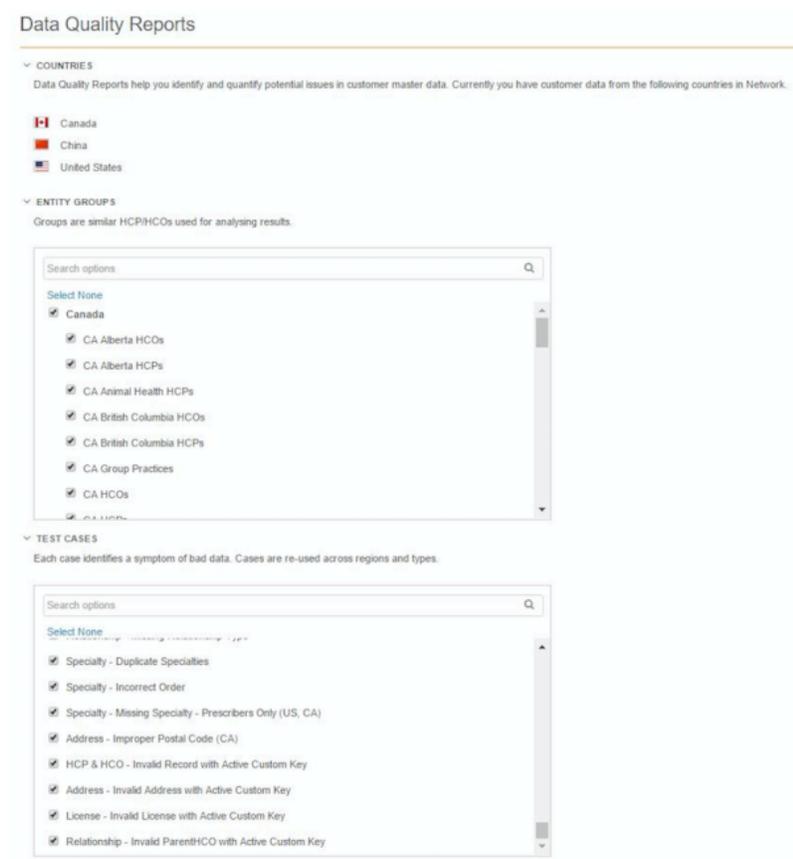
1. Search for an entity.
2. In the search results, hover over the entity name to highlight the pin on the search map.
3. Click the highlighted pin to view the business card.
4. Click the **Open in Street View** link.



This feature is enabled by default, however, the map must be enabled to display in the search results. Administrators can enable the map view by selecting the **Map on Search Page** option in the General Settings.

## Data quality reports

For Network instances that have Canadian data, predefined templates for test cases and entity groups are available for data quality reports.





## Configuration management

### EXPORTING SELECT CONFIGURATIONS

Administrators can now select specific configurations to export, instead of entire categories. When specific configuration records are chosen, any dependent configuration records are also added so that the configuration is complete. For example, if you select a target subscription called *CRM\_Export*, a system called *Veeva\_CRM* is automatically added to the export because the target subscription configuration depends on that system.

To export select configuration records:

1. In the Admin console, click **Settings > Export Configurations**.
2. On the Export Configurations page, expand the categories in the **Available Configurations** panel and select the configurations that you want to export.

You can select configuration categories (for example, Data Visibility Profiles) or individual records (for example, a target subscription called *CRM\_Export*).

When you select configuration records, Network identifies any dependencies and automatically moves those configuration records to the **Selected Configurations** pane.

**Note:** Some configurations use custom fields. Custom fields are not automatically added to your export, so ensure that any custom fields that are required for the selected configuration records are also selected.

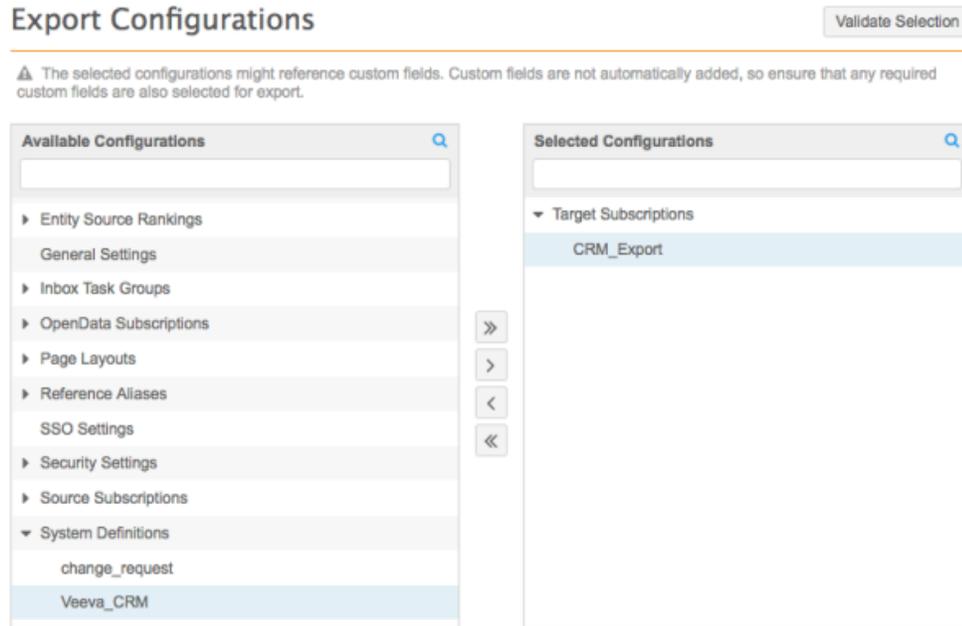
3. Click **Download** to export the configurations.



The exported file is downloaded in a compressed archive file with the following naming convention: ConfigExport\_<instance\_ID>\_<timestamp>\_GMT.zip.

### Validating configurations

You can remove selected configuration records from your export by moving the records from the **Selected Configurations** pane back to the **Available Configurations** pane. If you remove records that have dependencies to any selected configuration records, the **Download** button is replaced by a **Validate Selection** button.



Click **Validate Selection** to ensure that your selected configurations are complete. Any dependent configuration records are added to the **Selected Configurations** pane again. A message displays to indicate that the validation is complete and you can download the configurations.



### Exported file contents

The compressed archive includes the following files:

- A JSON file for each of the configuration categories containing the configuration records 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

## Veeva OpenData subscriptions

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The following topics describe updates for Veeva OpenData subscriptions.

### FILTERING PARENT HCO RECORDS

Previously, when users processed Veeva OpenData data change requests or downloaded or synced with Veeva OpenData, Parent HCOs (up to five levels) were automatically downloaded causing unwanted data in your instance. Now, you can filter the Parent HCOs so that you no longer download this data to your Network instance.

When users submit data change requests or download or sync with Veeva OpenData, HCO **Specialties** or **Types** filters (defined in your Veeva OpenData subscription) can be applied to HCPs and HCOs so that you can specify only the records that you want downloaded to your Network instance. Previously, Parent HCOs were automatically downloaded for affiliated HCPs regardless of the specified filters; for example, if you downloaded an HCP that is affiliated with a General Hospital, but you only want Veterinary HCOs in your instance, the General Hospital would be still be downloaded.

This feature is available for all Veeva OpenData subscriptions. By default, it is not enabled.

#### *Filter Parent HCOs*

Administrators can enable the option to filter unwanted Parent HCOs from being added to their instance when data change requests are processed or when users are syncing or downloading Veeva OpenData.

To filter the Parent HCOs:

1. In the Admin console, click **System Interfaces > Veeva OpenData Subscriptions**.
2. Choose a country that subscribes to Veeva OpenData.
3. In the Veeva OpenData Subscription Details section, under HCO, select the **Filter Parent HCOs during Ad Hoc Download and Data Change Requests** option.



**HCO**  Subscribe to additional Veeva OpenData HCO records

Filter Parent HCOs during Ad Hoc Download and Data Change Requests ⓘ

**Specialties**

Exotic Animal Medicine X Companion Animal Behavior X Animal Behavior X

Animal Protection X Animal Nutrition X

AND \_\_\_\_\_

**Types**

Animal Health Organization, Private Veterinary Practice X

---

Choose the number of levels of Parent HCOs to download during Add Requests, Change Requests, Download and Sync with OpenData.

**Parent HCO** 2 ▾ Level of Parents to download during Ad Hoc Download and Data Change Requests ⓘ

Download repointed Parent HCOs ⓘ

4. Define filters for the HCOs that you want to download. You can define **Specialties** or **Types**, or both.
5. In the **Parent HCO** section, choose the level of parents to download. The default level is five. If you do not want to download any Parent HCOs, select zero (0).
6. **Save** your changes.

Parent HCOs are filtered for ad hoc downloads only. This does not apply to the scheduled Veeva OpenData download that uses the working set. If you choose not to filter Parent HCOs, five levels of affiliations are downloaded regardless of the filters that you have defined for HCOs.

When Parent HCO filtering is enabled, during download, Network uses the filters to determine the affiliations to download. In a hierarchy, when a record that does not meet the filter criteria is found, Network stops looking for Parent HCOs to download. This means that Parent HCOs further up the hierarchy that meet the filter criteria are not downloaded. For more information, review the *Examples* section.

### *Examples*

Review the following examples to understand how Network determines which records to download when Parent HCO filtering is enabled.

In each of the examples, HCO **Types** filters have been applied to only allow Veterinary Parent HCOs to be downloaded to the Network instance.



**HCO**  Subscribe to additional Veeva OpenData HCO records

Filter Parent HCOs during Ad Hoc Download and Data Change Requests ⓘ

**Specialties**

Select a Specialty

AND

**Types**

Animal Health Organization, Private Veterinary Practice ✕ Government Veterinary Group ✕

Veterinary Corporate Group ✕ Veterinary Buying Group ✕ Veterinary Internet Retail ✕

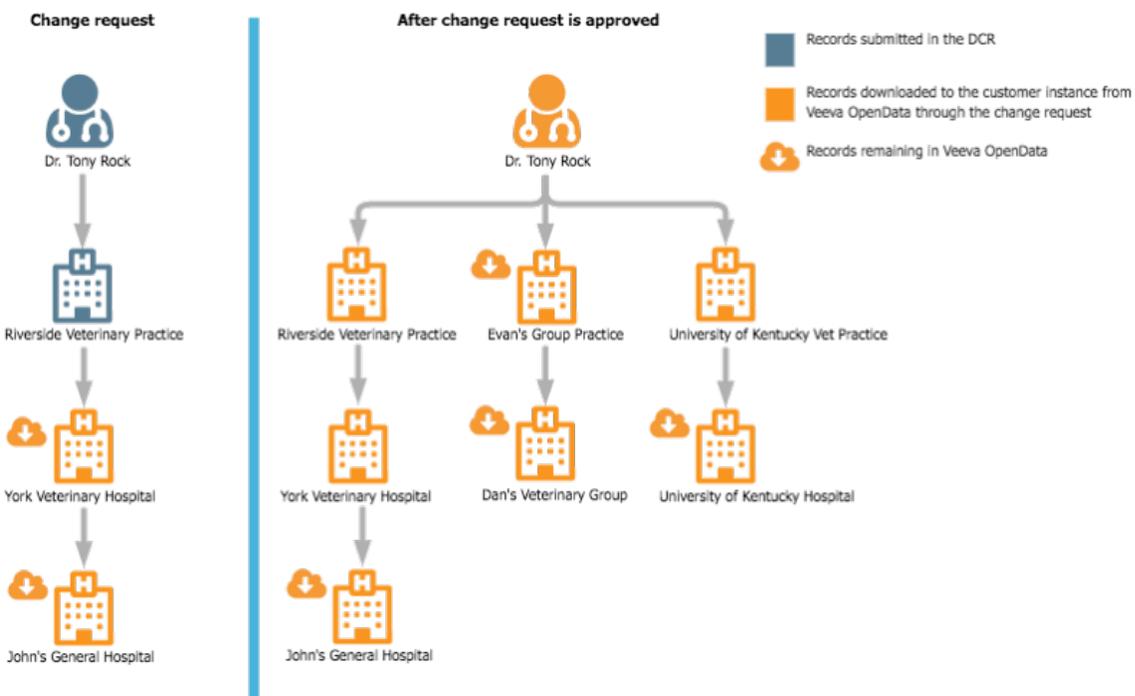
Veterinary Practice ✕ Other Veterinary Organization ✕ Organization, Veterinary Hospital ✕

Choose the number of levels of Parent HCOs to download during Add Requests, Change Requests, Download and Sync with OpenData.

**Parent HCO** 4 ▾ Level of Parents to download during Ad Hoc Download and Data Change Requests ⓘ

### Example 1 - Change request

A change request is created for a doctor. A ParentHCO relationship is included in the change request. When the request is submitted, Network downloads the doctor and the submitted Parent HCO and then uses the defined filters to determine whether any other Parent HCOs that exist in Veeva OpenData should be downloaded.



### Result

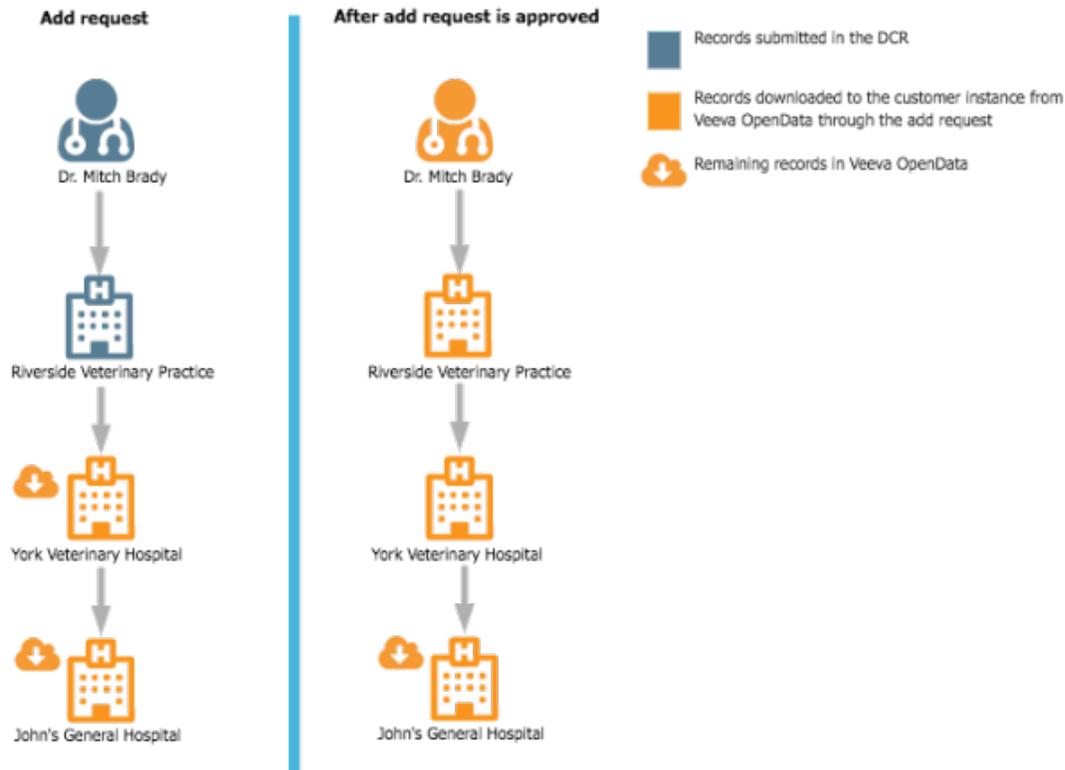
- Dr. Tony Rock is downloaded because the doctor was submitted in the DCR.
- Riverside Veterinary Practice is downloaded because it was submitted in the DCR.
- York Veterinary Hospital is downloaded because it meets the criteria of the defined filters in the subscription.



- John's General Hospital is not downloaded because it does not meet the filter criteria.
- Evan's Group Practice is not downloaded because it does not meet the filter criteria.
- Dan's Veterinary Group meets the filter criteria, but it is not downloaded because Network stopped searching for applicable records in that hierarchy when Evan's Group Practice did not meet the filter criteria.
- University of Kentucky Vet Practice is downloaded because it meets the filter criteria.
- University of Kentucky Hospital is not downloaded because it did not meet the filter criteria.

**Example 2 - Add request**

An add request is created for Dr. Mitch Brady. A ParentHCO relationship is included in the add request. When the request is submitted, Network downloads the doctor and the submitted Parent HCO and then uses the defined **Specialties** and **Types** filters to determine whether any other Parent HCOs that exist in Veeva OpenData should be downloaded.



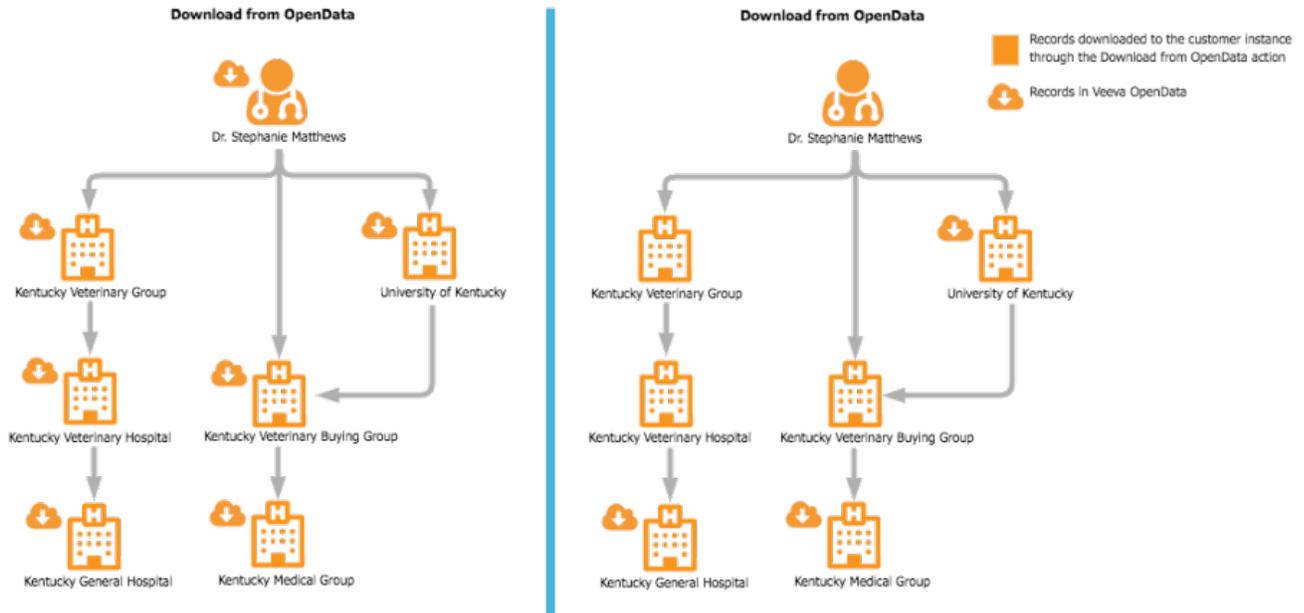
**Result**

- Dr. Mitch Brady is downloaded because the doctor was submitted in the DCR.
- Riverside Veterinary Practice is downloaded because it was submitted in the DCR.
- York Veterinary Hospital is downloaded because it meets the criteria of the defined filters in the subscription.
- John's General Hospital is not downloaded because it does not meet the filter criteria.



### Example 3 - Download from Veeva OpenData

An ad hoc **Download from OpenData** job is submitted for Dr. Stephanie Matthews. Network downloads the doctor and then uses the defined **Specialties** and **Types** filters to determine any other Parent HCOs that should be downloaded to the Network instance.



### Result

- Dr. Stephanie Matthews is downloaded because the **Download from OpenData** job was submitted for this record.
- Kentucky Veterinary Group is downloaded because it meets the criteria of the defined filters.
- Kentucky Veterinary Hospital is downloaded because it meets the criteria of the defined filters.
- Kentucky General Hospital is not downloaded because it does not meet the filter criteria.
- Kentucky Veterinary Buying Group is downloaded because it meets the criteria of the defined filters.
- Kentucky Medical Group is not downloaded because it does not meet the filter criteria.
- University of Kentucky is not downloaded because it does not meet the filter criteria.

### *Understanding how Parent HCOs are added to your instance*

Review the following behavior to understand how HCOs from Veeva OpenData are added to your Network instance through Search, data change requests, and syncing and downloading from Veeva OpenData.



Action	Network instance	CRM instance
Network Search	<p><b>Default behavior:</b> Five levels of affiliations are downloaded. Entities include address, licenses, and ParentHCO affiliations.</p> <p><b>Filters applied:</b> Downloads consider the <b>Specialties</b> and <b>Types</b> filters and the selected <b>Parent HCO</b> levels defined in the subscription. Entities include address, licenses, and filtered ParentHCO affiliations.</p>	<p>(Using Veeva - CRM bridge)</p> <p><b>Default behavior:</b> One level of affiliation is downloaded to Veeva CRM. Entities include address, licenses, and ParentHCO affiliations.</p> <p><b>Parent Selection:</b> Network Account Search displays the Parent HCOs of the selected entities so users can select the parents to download.</p>
Data change requests	<p><b>Default behavior:</b> Five levels of affiliations are downloaded. Entities include address, licenses, and ParentHCO affiliations.</p> <p><b>Filters applied:</b> Downloads consider the <b>Specialties</b> and <b>Types</b> filters and the selected <b>Parent HCO</b> levels defined in the subscription. Entities include address, licenses, and filtered ParentHCO affiliations.</p>	<p>(Using Veeva - CRM bridge)</p> <p><b>Default behavior:</b> One level of affiliation is downloaded to Veeva CRM. Entities include address, licenses, and ParentHCO affiliations.</p>
<p>Sync with Master / Download from OpenData</p> <p>(Search results and Profile page)</p>	<p><b>Default behavior:</b> Five levels of affiliations are downloaded. Entities include address, licenses, and ParentHCO affiliations.</p> <p><b>Filters applied:</b> Downloads consider the <b>Specialties</b> and <b>Types</b> filters and the selected <b>Parent HCO</b> levels defined in the subscription. Entities include address, licenses, and filtered ParentHCO affiliations.</p>	<p>(Using target subscriptions)</p> <p>Downloaded entities include addresses and licenses. ParentHCOs are downloaded when both the child and parent entities are included</p> <p>(unless the <b>Apply Group Conditions to Parent HCOs</b> option is enabled in the subscription).</p>



Action	Network instance	CRM instance
Ad Hoc Download (Veeva OpenData Subscription page)	<p><b>Default behavior:</b> Five levels of affiliations are downloaded. Entities include address, licenses, and ParentHCO affiliations.</p> <p><b>Filters applied:</b> Downloads consider the <b>Specialties</b> and <b>Types</b> filters and the selected <b>Parent HCO</b> levels defined in the subscription. Entities include address, licenses, and filtered ParentHCO affiliations.</p>	(Using target subscriptions) Downloaded entities include addresses and licenses. ParentHCOs are downloaded when both the child and parent entities are included (unless the <b>Apply Group Conditions to Parent HCOs</b> option is enabled in the subscription).

### *Veeva CRM considerations*

In Veeva CRM, when using the Network Account Search to import an HCP record, users can select the associated Parent HCO to import and align to the user's territory. When this feature is enabled, a dialog displays the list of Parent HCOs to select.

To enable this feature, in Veeva CRM, set the **ADD\_PARENTS\_TO\_TERRITORY\_vod** Network Setting to *1*. For more information, see the *Veeva CRM Online Help*.

### **PARENT HCO CHANGES**

When required, Veeva OpenData changes the parent in a ParentHCO relationship to a new HCO. If your Network instance does not contain the new Parent HCO, this means that you might have ParentHCO relationships pointing to a record that does not exist in your Network instance.

Now, to ensure that ParentHCO relationships are complete, when a relationship is changed to a Parent HCO that is not in your Network instance, the record can be downloaded even if it does not meet your Veeva OpenData subscription filters or working set. For example, if your Veeva OpenData subscription filters or working set are defined to only download Veterinary HCOs, but a relationship has changed so that an HCP now has a Parent HCO that is a General Hospital, the General Hospital will be downloaded to your instance. This ensures that you receive the latest relationship data.

### *Enable this feature*

This feature is enabled by default when you subscribe to Veeva OpenData for a new country. The feature can be enabled in the Veeva OpenData subscription settings for countries that you already subscribe to.

To enable this feature:

1. In the Admin console, click **System Interfaces > Veeva OpenData Subscriptions**.
2. Choose a country with an existing subscription to Veeva OpenData.



3. In the **Veeva OpenData Subscription Details** section, select the **Download repointed Parent HCOs** option.

Parent HCO  Level of Parents to download during Ad Hoc Download and Data Change Requests ⓘ

Download repointed Parent HCOs ⓘ

4. **Save** your changes.

## Change requests

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

### PROFILE LINK

Data stewards can now link to the profile of an unverified record directly from an add request instead of searching for the record. The link displays in the right pane of the Add Request page, in the **Subject** section. The link is only available if the record state is *Pending Review* or *Valid*. If the Add Request is rejected, the page does not display a link to the record.

Profiles for unverified records are created only if the **Create Unverified** option in the Workflow Settings page is enabled. If this option is not enabled in your Network instance, a profile is not created and a link does not display in add requests.

For more information about creating unverified records, see the *Veeva Network Online Help*.

### REQUEST SUMMARY

The **Request Summary** pane in data change requests contains information that data stewards refer to when they are processing a request. Now, the **Request Summary** pane remains fixed to the top of the browser window as data stewards scrolls down the page.



## PRIMARY ADDRESS OR AFFILIATION

In an add or change request, if an inactive object is set to *Primary*, or a primary object is set to *Inactive*, the DCR is successfully processed. Network automatically finds the next best primary to add to the record. Previously, when users deactivated a primary affiliation, the DCR would be automatically rejected, which was an issue when users were trying to submit updates in the field.

## Match

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The following enhancement has been made to the match feature for this release.

### CHINESE MATCH RULES

The default match rules have been updated to improve match outcomes for matching Chinese records in any instance. For example, additional attributes have been included in the match rules and the confidence levels of some comparisons have been adjusted.

The Chinese default match rules now use the following rules in descending order of importance.

#### *ACT match rules (HCP)*

1. parent HCO name, HCP name, gender, and professional title are identical and specialties match
2. parent HCO name, HCP name, and gender are identical and specialties match
3. parent HCO name, HCP name, gender, and professional title are identical

#### *ASK match rules (HCP)*

1. parent HCO name and HCP name are identical
2. parent HCO name, pinyin name, and gender are identical and specialties match
3. parent HCO name, pinyin name, gender, and professional title are identical
4. parent HCO name and pinyin name are identical
5. parent HCO name is similar, HCP name and gender are identical, and specialties match
6. parent HCO name is similar; HCP name, gender and professional title are identical
7. parent HCO name is similar, pinyin name and gender are identical, and specialties match
8. parent HCO name is similar; pinyin name, gender, and professional title are identical
9. parent HCO name is similar and HCP name is identical
10. parent HCO name is similar and pinyin name is identical

The name comparisons leverage different algorithms to evaluate match pairs.

**Note:** Matching does not occur on the `formatted_name__v` field; it is a derived field.

#### *ACT match rules (HCO)*

1. names are identical, addresses match, and HCO type is the same
2. names are identical, city name matches, and HCO type is the same
3. names are identical and addresses match



### ASK match rules (HCO)

1. pinyin names are identical and addresses matches
2. pinyin names are identical and city name matches
3. names are similar using nGram and addresses match
4. names are similar using nGram and city name

The name comparisons leverage different algorithms to evaluate match pairs.

### Reference data

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The following enhancement has been made to reference data for this release.

#### MISSING ALIASES

When reference codes are added, they often require an alias to be created to map the Network code to your customer code. Previously, any codes that did not have aliases caused records to fail; for example, a target subscription skipped records that had missing aliases. Now, missing aliases do not cause records to fail during subscription jobs.

Using the Target subscription page, administrators and data managers can define the action that Network should take when an unmapped reference code is found.



The following options are available:

- **Skip record** - Do not export the record.
- **Keep original code** - Export the record with the original code.
- **Replace with custom value** - Specify a custom value in the **Replacement Value** field.

### Search

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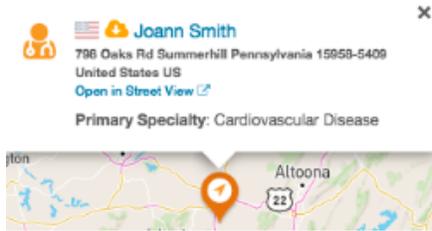
The following enhancement has been made to Search for this release.

#### STREET VIEW

Using the map in the search results, users can now open an entity's address in street view directly from the business card.

To view the business card:

1. Search for an entity.
2. In the search results, hover over the entity name to highlight the pin on the search map.
3. Click the highlighted pin to view the business card.
4. Click the **Open in Street View** link.



This feature is enabled by default, however, the map must be enabled to display in the search results. Administrators can enable the map view by selecting the **Map on Search Page** option in the General Settings.

## Profile

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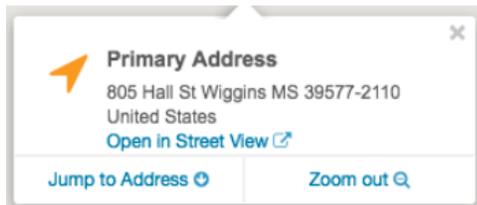
The following enhancement has been made to the Profile page for this release.

### STREET VIEW

Using the map in the profile, users can now open an entity's address in street view directly from the business card.

To view the business card:

1. Open the profile for an entity.
2. In the **Addresses** section, click a pin on the map to view the business card.
3. Click the **Open in Street View** link.



This feature is enabled by default, however, the map must be enabled to display in the profile. Administrators can enable the map view by selecting the **Map on Profile Page** option in the General Settings.

## Custom keys

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### REJECTING RECORDS WITH DUPLICATE CUSTOM KEYS

Network has duplicate custom key prevention to reject duplicates that are loaded through the same source subscription job. This enhancement helps to preserve data quality.

This feature is now available in all Network instances, but it is not enabled by default. To enable this feature, administrators can select the **Reject Duplicate Keys** option in the General Settings.



Data Model

Reject Duplicate Keys  ⓘ

Enabling this option ensures that source subscriptions do not load records that contain duplicate keys.

For more information about duplicate custom keys, see the *Veeva Network Online Help*.

**Note:** This feature does not apply to duplicate custom keys that have previously been loaded to your Network instance. To clean up the existing duplicates custom keys, contact Veeva Support for a list of the duplicates and recommended action.